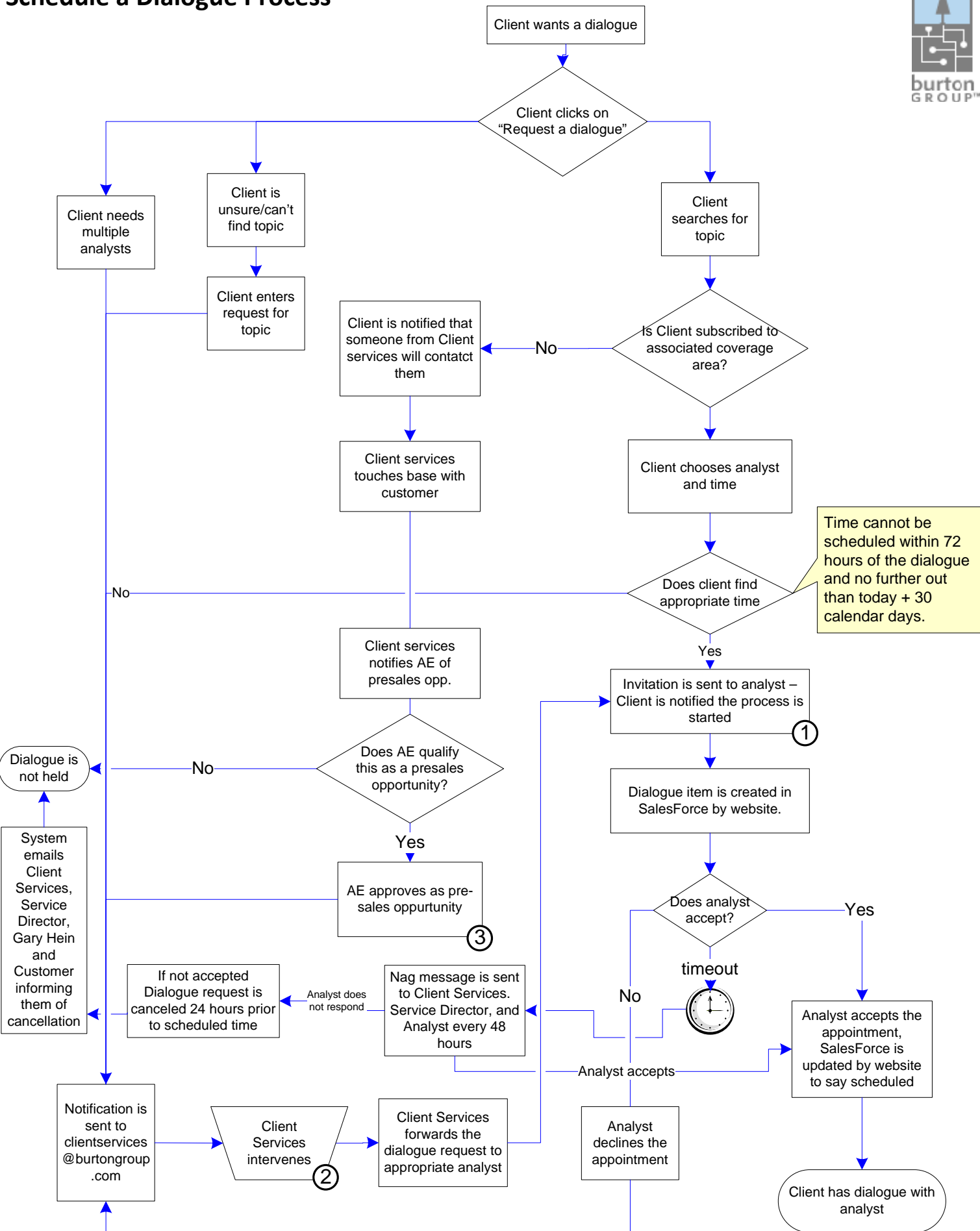
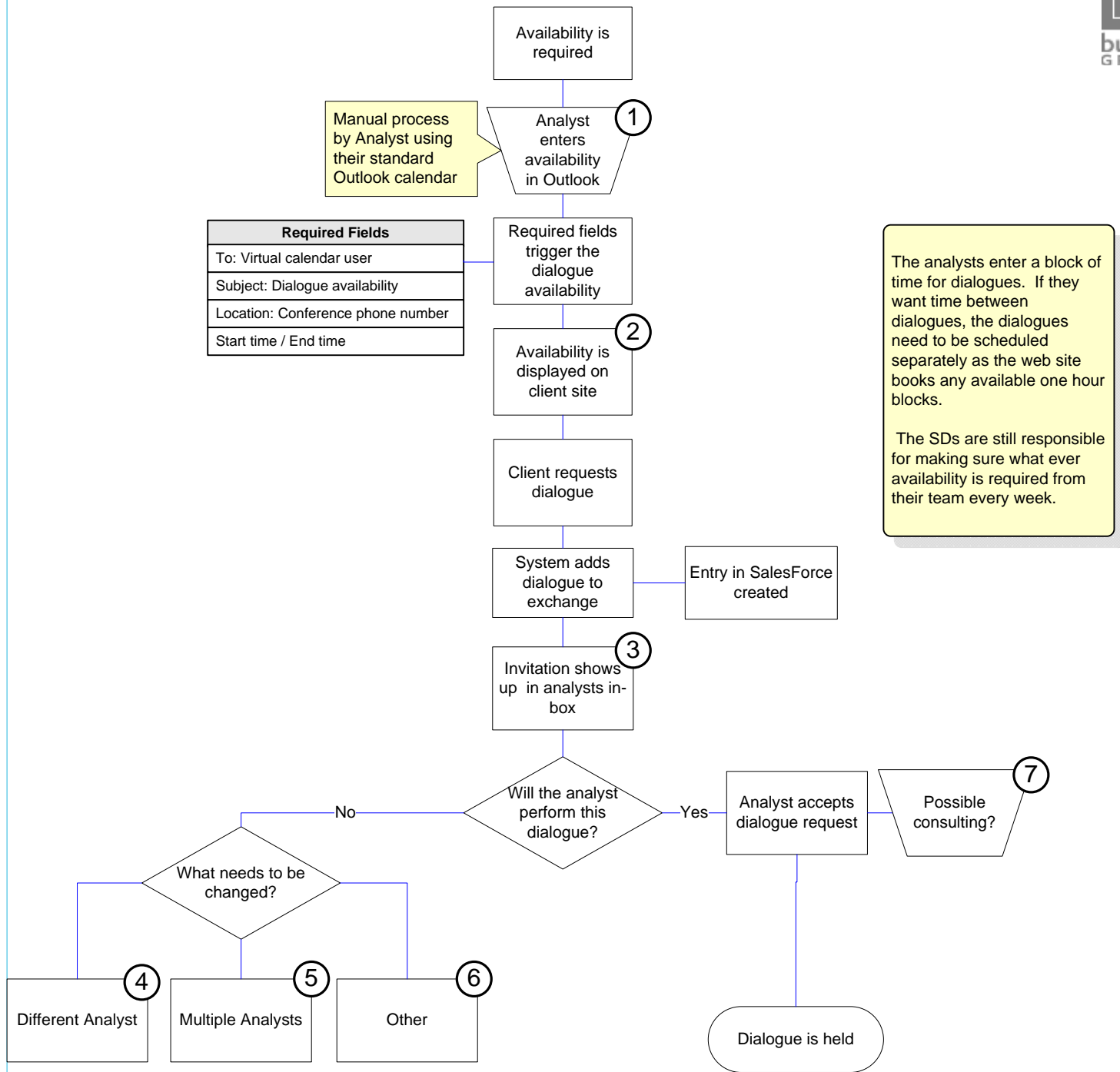
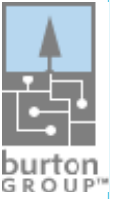


Schedule a Dialogue Process



This document is proprietary and confidential.

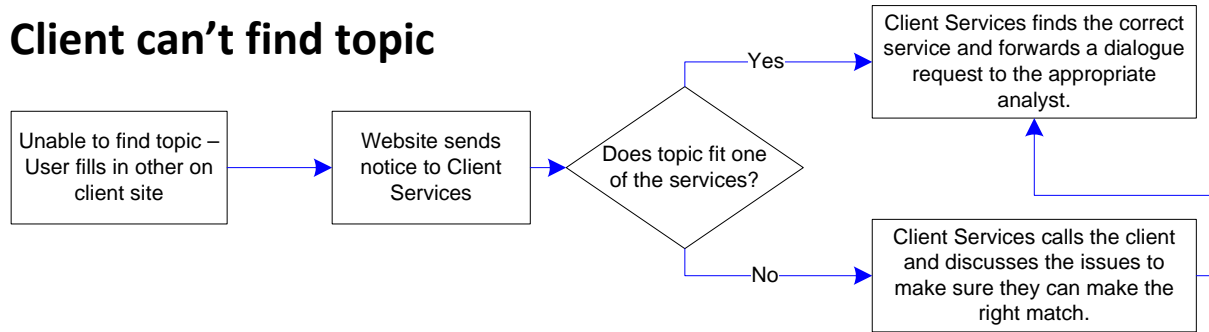
Analyst workflow



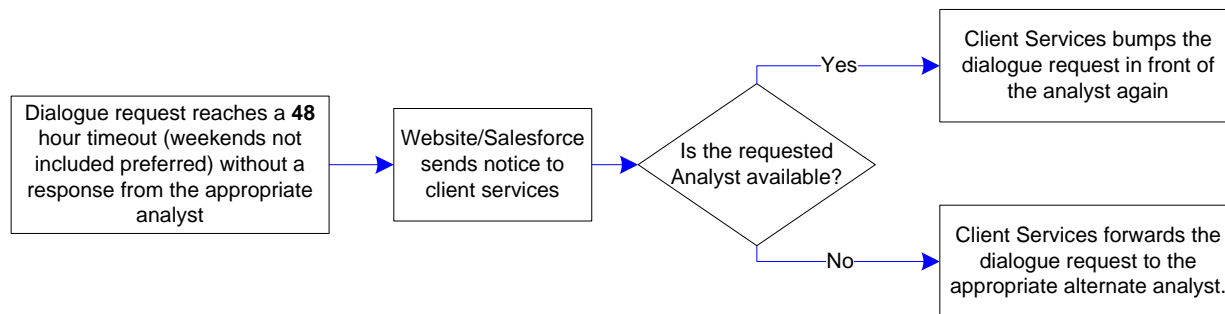
Assigning of analysts to topics

There will be an interface in Sharepoint that allows the SD to map individuals to topics – database is currently being built.

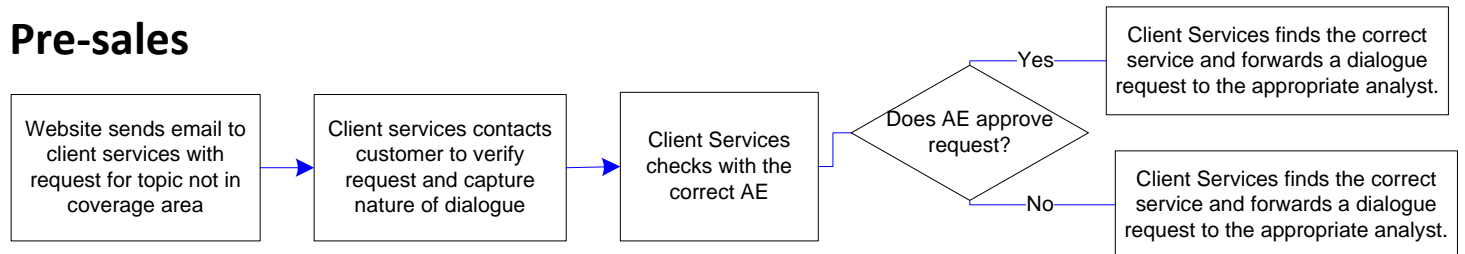
Client can't find topic



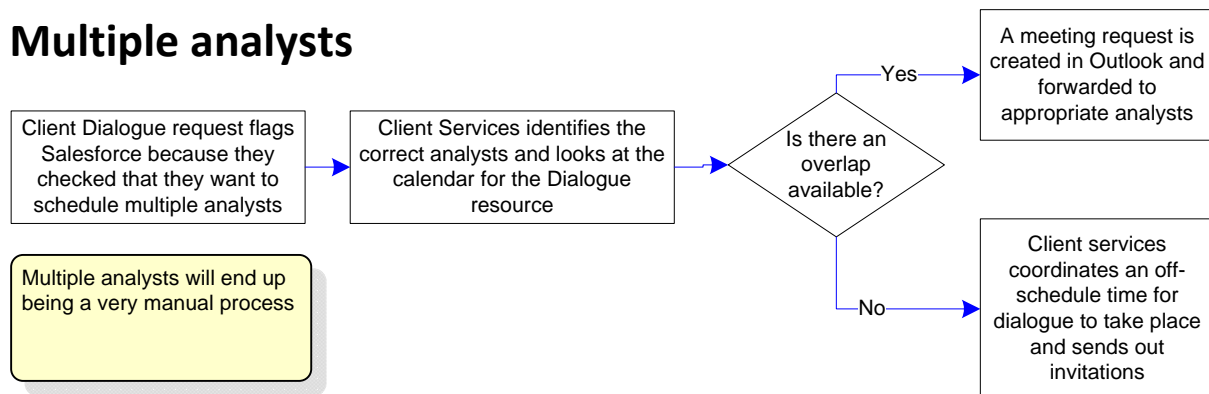
Request timeout



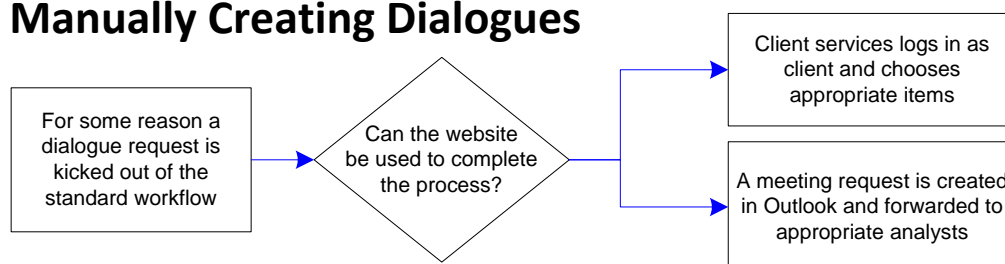
Pre-sales



Multiple analysts



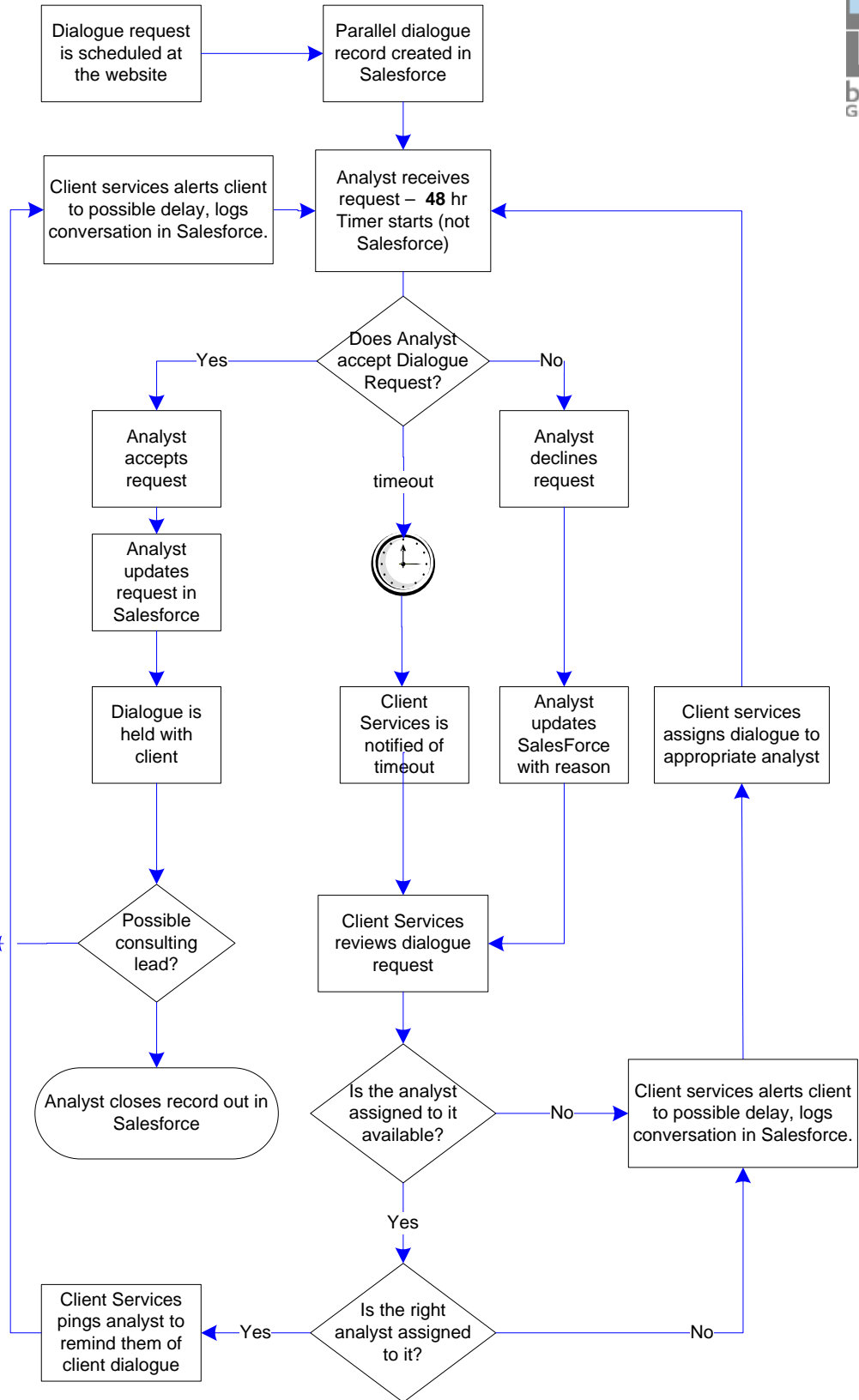
Manually Creating Dialogues



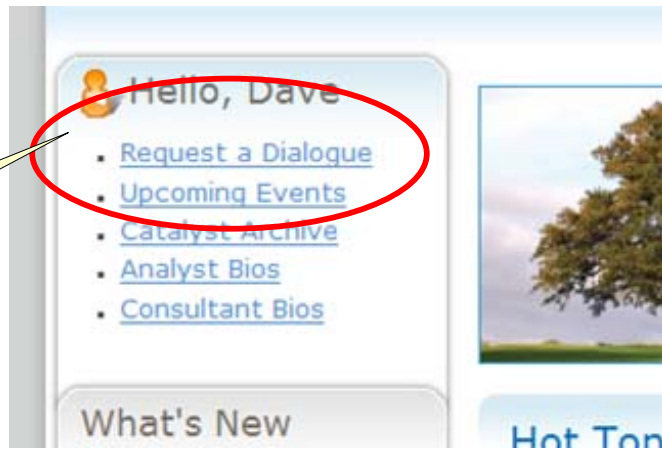
Known requirements for Salesforce.

- Service Directors want a report/mail that allows them to keep tabs on their analysts
- Dialogues are recorded in full in Salesforce
- Possibility to forward dialogue as a pre-sales event
- Possibility to forward the dialogue to the "rainmaker for that particular service
- Client Services may need to modify dialogue elements
- Analysts may need to modify dialogue elements

Analyst alerts "Rainmaker" or possibly consulting and provides info through Salesforce



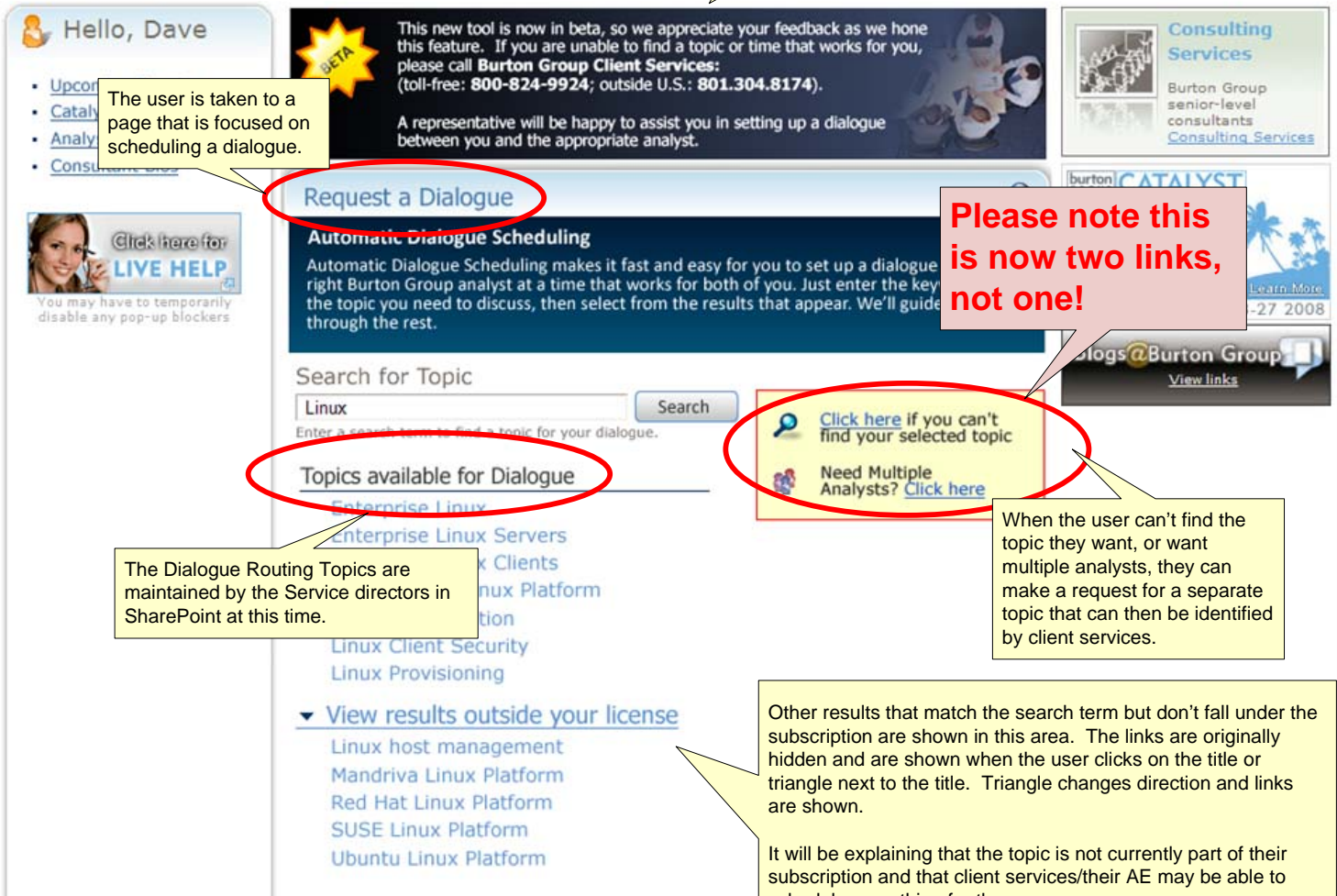
Schedule Dialogue Interface



Customer initiates a dialogue request from any quick links section throughout the site.



Headline message – user should not be able to hide this



The user is taken to a page that is focused on scheduling a dialogue.

BETA
This new tool is now in beta, so we appreciate your feedback as we hone this feature. If you are unable to find a topic or time that works for you, please call **Burton Group Client Services**: (toll-free: **800-824-9924**; outside U.S.: **801.304.8174**).
A representative will be happy to assist you in setting up a dialogue between you and the appropriate analyst.

Request a Dialogue
Automatic Dialogue Scheduling
Automatic Dialogue Scheduling makes it fast and easy for you to set up a dialogue with the right Burton Group analyst at a time that works for both of you. Just enter the key words for the topic you need to discuss, then select from the results that appear. We'll guide you through the rest.

Please note this is now two links, not one!

Search for Topic
Linux
Enter a search term to find a topic for your dialogue.
Topics available for Dialogue
Enterprise Linux
Enterprise Linux Servers
Linux Clients
Linux Platform
Linux Client Security
Linux Provisioning
▼ **View results outside your license**
Linux host management
Mandriva Linux Platform
Red Hat Linux Platform
SUSE Linux Platform
Ubuntu Linux Platform

Click here if you can't find your selected topic
Need Multiple Analysts? Click here

When the user can't find the topic they want, or want multiple analysts, they can make a request for a separate topic that can then be identified by client services.

The Dialogue Routing Topics are maintained by the Service directors in SharePoint at this time.

Other results that match the search term but don't fall under the subscription are shown in this area. The links are originally hidden and are shown when the user clicks on the title or triangle next to the title. Triangle changes direction and links are shown.
It will be explaining that the topic is not currently part of their subscription and that client services/their AE may be able to schedule something for them.



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proprietary and confidential.

Other Topic or Multiple Analysts Requested by Client



Topic Request

Client services will be notified that you can't find an appropriate topic or would like to have a dialogue with multiple analysts. They will be contacting you shortly.

Add a short specific description to help Client Services find the appropriate analyst(s).

Topic Request: <client topic here> - Message (Plain Text)

File Edit View Insert Format Tools Actions Help Adobe PDF

Reply Reply to All Add to EverNote SnagIt Window

From: Burton Group Sent: Tue 12/11/2007 3:04 PM

To: Burton Group Client Services

Cc:

Subject: Topic Request: <client topic here>

Client name: <client name here>
[Click here to find the person in Salesforce.](#)

The client could not find an appropriate topic and has entered the following details to help find the right analyst.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed at diam. Praesent consequat, lacus id elementum mollis, sapien est hendrerit arcu, gravida dignissim massa turpis sit amet nisl. Proin eleifend hendrerit mauris. Suspendisse lacus leo, ultricies laoreet, feugiat quis, rutrum at, magna. Nunc viverra, risus non dignissim viverra, orci mi auctor eros, ac dignissim magna lacus at nunc. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque porttitor lectus id augue. Phasellus eget ipsum eget lacus sodales venenatis. Suspendisse hendrerit. Nullam at felis et mi fringilla pharetra. Nullam euismod, justo lacinia pharetra placerat, massa

Multiple Analysts

Client services will be notified that would like to have a dialogue with multiple analysts. They will be contacting you shortly.

Add a short specific description to help Client Services find the appropriate analyst(s).

Multiple Analysts Dialogue Request

File Edit View Insert Format Tools Actions Help Adobe PDF

Reply Reply to All Add to EverNote SnagIt Window

From: Burton Group Sent: Tue 12/11/2007 3:04 PM

To: Burton Group Client Services

Cc:

Subject: Topic Request: <client topic here>

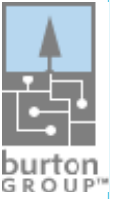
Client name: <client name here>
[Click here to find the person in Salesforce.](#)

The client has requested to have a dialogue with multiple analysts and has entered the following details to help find the right analysts.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed at diam. Praesent consequat, lacus id elementum mollis, sapien est hendrerit arcu, gravida dignissim massa turpis sit amet nisl. Proin eleifend hendrerit mauris. Suspendisse lacus leo, ultricies laoreet, feugiat quis, rutrum at, magna. Nunc viverra, risus non dignissim viverra, orci mi auctor eros, ac dignissim magna lacus at nunc. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque porttitor lectus id augue. Phasellus eget ipsum eget lacus sodales venenatis. Suspendisse hendrerit. Nullam at felis et mi fringilla pharetra. Nullam euismod, justo lacinia pharetra placerat, massa

This document is proprietary and confidential.

Selecting the Time, Analyst, and Topic



Schedule a Dialogue on Rich Internet Applications

Available times during the next 4 weeks:
All times are displayed in:

- Wednesday, 06 Nov 2007 2:00pm EST to 4:00pm EST
Analyst: John Doe
- Wednesday, 13 Nov 2007 2:00pm EST to 4:00pm EST
Analyst: John Doe
- Wednesday, 20 Nov 2007 2:00pm EST to 4:00pm EST
Analyst: Jane Doe
- Wednesday, 27 Nov 2007 1:00pm EST to 3:00pm EST
Analyst: Jane Doe
- Friday, 29 Nov 2007 1:00pm EST to 3:00pm EST
Analyst: Jane Doe

Schedule a Dialogue on Rich Internet Applications

The time requested is no longer available.
Click Back to try a different time, or click Notify Client Services to have a Client Services representative help you connect with an analyst who can answer your questions.

I am unable to make these times. Contact me directly.

Add a short specific description to help the analyst prepare:

An option is available at the bottom of both the analyst and topic selector that allows the client to alert client services.

Schedule a Dialogue with John Doe

You are scheduling a dialogue to talk with John Doe about Development Languages on 7 Jan 2008 at 4:00pm.

The details you entered are:

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nam lobortis, tortor sit amet tincidunt pretium, justo nibh mollis orci, nec elementum dolor turpis eu erat. Aenean porta mi eget turpis. Duis condimentum ligula eu erat. Mauris accumsan elementum massa. Nulla facilisi. Mauris id pede vitae orci elementum sollicitudin. Integer massa augue, euismod vel, luctus et, vulputate eu, lacus. Aenean feugiat auctor nisi. Vivamus posuere porttitor diam. Aliquam eget diam eu augue posuere porta.

The invitation is sent to the email address on file which is: clientemailgohere@email.com

Enter an alternate e-mail address here:

Invite other parties to this dialogue by entering e-mail addresses here, separated by semi-colons:

Schedule a Dialogue on Rich Internet Applications

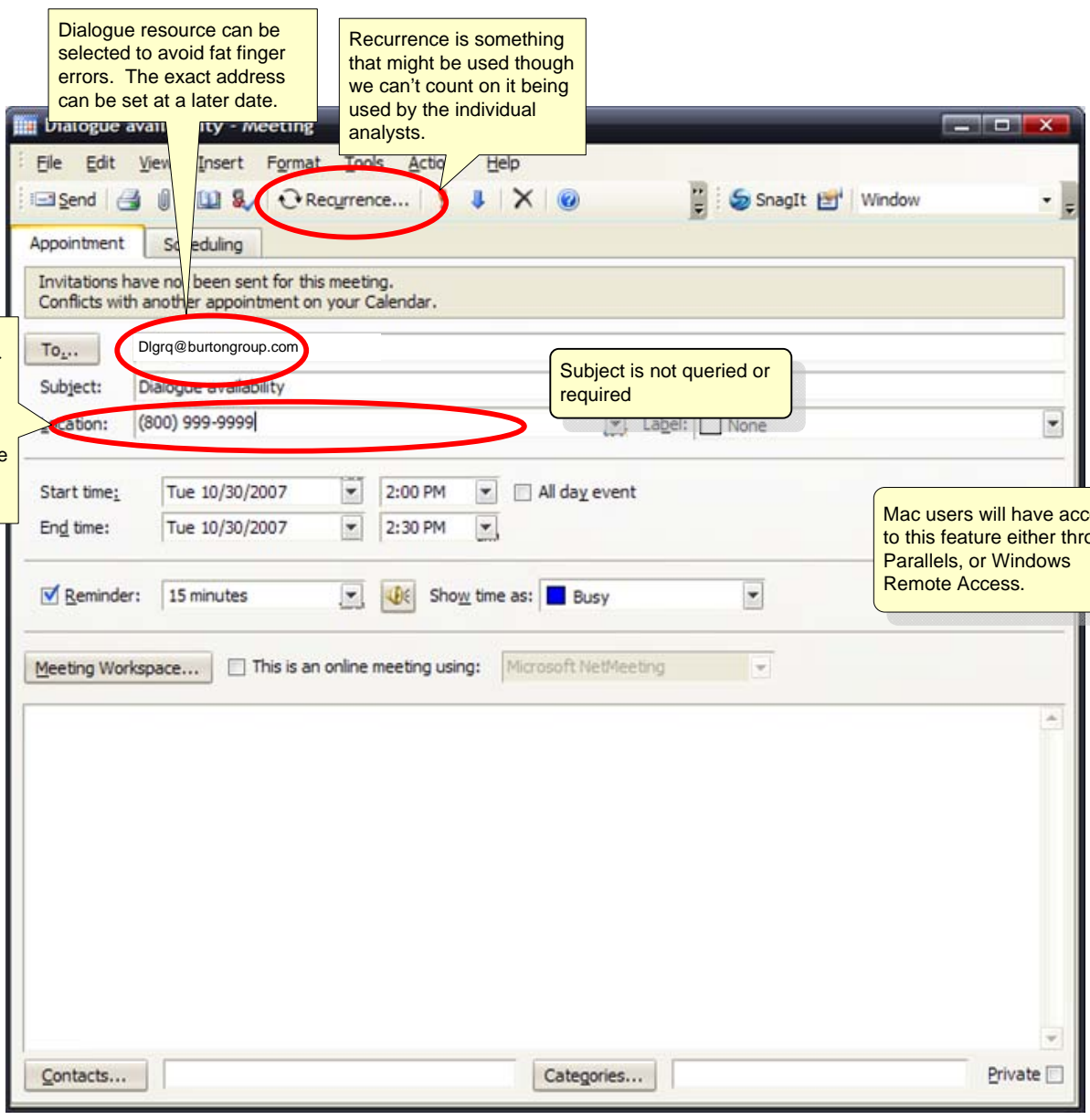
No available times in next 4 weeks:
A Burton Group Client Services Representative will contact you shortly to give you personal assistance in connecting you with an analyst who can answer your questions.

Client Services Notified

Client Services has been notified, and will be contacting you shortly to schedule your dialogue.

Dialogue Request Completed

A dialogue request has been sent to the appropriate analyst. If the analyst is able to perform the dialogue, you will receive an invitation via e-mail for your requested time. If not, you will be contacted by client services to complete the process.



Dialogue resource can be selected to avoid fat finger errors. The exact address can be set at a later date.

Recurrence is something that might be used though we can't count on it being used by the individual analysts.

The analyst should make sure that their number for conferencing is included as part of the original schedule so it can be passed on to the end user.

Subject is not queried or required

Mac users will have access to this feature either through Parallels, or Windows Remote Access.

SalesForce Required Fields



The screenshot shows a Salesforce Service Request record for '00019134'. The record is titled 'Dialog Request Information' and includes the following details:

- Service Request Number:** 00019134
- Contact Name:** Ross Hall
- Account Name:** Queensland University of Technology
- Account Manager:** Scott LeGueur
- Service Subscriptions:** CCS, DCB, IDPS, NTS
- Out of Scope Reason:** [Dropdown]
- Contact Phone:** 61 7 3138 9491
- Contact Email:** r.hall@qut.edu.au
- Created By:** Shaleena Lazaro, 7/20/2007 10:08 AM
- Service Request Origin:** [Dropdown]
- Expiration:** 12/31/2007

The record is categorized as 'Dialog Service' with a 'Priority' of 'Medium'. The 'Dialogue Service' is 'DCS', the 'Dialogue Type' is 'E-mail/Phone', and it is marked as 'Is Pre Sale Dialogue' (checked). The current 'Status' is 'Assigned'.

The 'Date/Time Closed' is 1/23/2007 9:37 AM, and the 'Service Request Record Type' is 'Service Request - Dialogue'. The 'Last Modified By' is 'Cora Tabbell' on 1/17/2007 12:38 PM.

The 'Service Request History' table shows the following actions:

Date	User	Action
1/17/2007 12:38 PM	Cora Tabbell	Changed Status From Assigned to Scheduling Requested
1/10/2007 9:15 AM	Richard Jones	Changed Service Request Owner From Richard Jones to Blair Rowland
1/10/2007 9:15 AM	Richard Jones	Changed Description
1/10/2007 11:28 AM	Cora Tabbell	Changed Service Request Owner From Andrew Hill to Richard Jones
8/14/2007 3:10 PM	Shaleena Lazaro	Changed Service Request Owner From Shaleena Lazaro to Blair Rowland
8/14/2007 3:08 PM	Shaleena Lazaro	Changed Description

At the bottom of the page, there are sections for 'Activity History' and 'Open Activities', both of which currently show 'No records to display'. There are also buttons for 'Log A Call', 'Mail Merge', and 'Send An' in the Activity History section, and 'New Task' and 'New Event' in the Open Activities section.

Report Format



	A	B	C	D	E	F	G	H	I	J
1	Availability report for the week ending <DD-MMM-YYYY>									
2	<Service Name>									
3	Employee Name		Hours of availability							
4	<Analyst Name1>		6							
5	<Analyst Name2>		4							
6	<Analyst Name3>		4							
7	<Analyst Name4>		4							
8	<Analyst Name5>		4							
9	<Analyst Name6>		3							
10	<Analyst Name7>		1							
11	<Analyst Name8>		0							
12										
13										
14										

A weekly report is generated based on the availability of analysts from the previous week.

This information is gathered by Exchange which is then queried by SharePoint. A report is then created in Excel format.

The Service Director (or individuals with the correct access rights) can subscribe to receive this report in Excel format delivered to their inbox every Monday morning or, have a link delivered that takes them to the appropriate folder in SharePoint.

Currently, this assumes that each and every analyst is assigned to one and only one service and therefore service director.