

Software Development Account Manager's Briefing

Brad Larkin
Jan 23, 2007

Purpose

- To help Account Managers and key personnel.
 - Understand the capabilities available from the Software Development Group.
 - Be better able to identify Software Development business opportunities at clients.
- By combining these two approaches, the perception of your value to the client should be enhanced.

Topics

- Minor Automations
- Web Applets
- Applications
- Identifying Opportunities
- Reports

Minor Automations

- Minor automations are small pieces of functionality that run on a schedule.
 - Task Scheduler
 - SQL Agent Job
- Purposes
 - Maintenance
 - Check Disk Space, Move files
 - Archive old records
 - Report generation
 - Generate *Central Notification* messages
- Technologies
 - DOS batch files
 - VBScript and WSH Scripting
 - SMTP - Email

Automation Business Opportunities

- Ask the questions that will add value.
 - “*What’s something you wish your main application did for you?*”
 - “*Would it help your collections folks to get an email when there are electronic claims which have not been responded to in 3 days?*”

Web Applets

- Refers to data-driven web content and functionality.
 - Intranet, Internet, Extranet
- Can be focused on internal or external user community.
 - Patient credit card payment form.
 - SSL encrypted document upload

Web Capabilities

- Web queries and reports
 - Data entry tools
 - Printable Reports
 - XML data exchange with other systems
 - Credit card processing
-
- ASP, DotNet, Java, what do we use?
 - Focus your discussions with clients on the Business Needs and Capabilities desired, not specific technologies.

Applications

TWG has developed some full-blown line of business applications.

- Claimpoint!
- eTWCC / Front Desk Forms
- TSD Link – Sleep Medicine

These topics are beyond the scope of this presentation.

Identifying Opportunities

- Business Approach
 - Not Desktop Support
 - Not AutoTask work order data entry
- Top-Down Approach
 - What is CEO / CFO spending a lot of time doing?
 - Is it mundane, would they rather not?

- What are their biggest concerns?
- Are they getting all the business information they'd like to get?
- What are subordinate managers doing?

Knowing your Client

- Pie chart of their FTE utilization.
- What areas can impact client's profitability?
- How is key players compensation structured?
- If getting a particular report is important to the client, what else could we do along the same theme?

Reports

- Why do we have them?
- When do clients need them?
- What formats and technologies does TWG use?
- How should you initiate and execute a Report project?

Business Purposes of Reports

- Summarize data in a concise way
- Monitor performance
- Inform a decision
- Spot trends and anomalies
- Conduct an audit

Reports are the main instrument by which businesses are run.

Report Usage

- How is the client going to use the report?
 - Large, printed record for file record / archive
 - Work list for a task worker
 - Employee / business performance review
- Who is the intended audience for the report?
 - Physicians and external parties – very sharp layout.
 - Analyst who is going to take the figures and then do many calculations with them.

Types of Reports

- Excel Spreadsheet
- Email summary
- Web Query
- Printable
 - MS Access
 - Crystal Reports
 - ActiveReports

MS Excel Spreadsheet

- Ad hoc or one time only data sets.
 - Quick and easy to paste data from SQL tools into Excel.
 - 1-2 hours for straight forward information requests.
 - Complex queries may take 3-6 hours to build and test.
- Can be container for large report sets
 - Complex graphing or calculation tables
 - Combines many datasets into a single file.
- Remember HIPAA applies to Excel. Do not email patient-identifiable information.

Email Summary

- Good for small amount of data.
 - e.g. *How many patients took an Outcomes survey last month.*
- Can be automated.
 - Requires some coding for the report and then the email addressing. Typically 4-6 hours.
 - Customers like being 'contacted' with information.

Web Query

- Very accessible, HTML output
- Can be combined with other output types.
- Flexibility - We prefer to create user-selectable filters so that they can refine their data slices without the need for additional development.
- Good for 1-2 pages of data

Printable Reports

- Client requires control of print formatting.
- Large number of printed pages (> 2).
- Requires a *Report Engine*
 - MS Access
 - Crystal Reports
 - ActiveReports
- Development is most expensive and least flexible.

- Typically 4-8 hours for basic report.
- Involves dragging fields on report template

MS Access

- Easy to use Report creation tool but requires MS Access client.
 - Has good Wizards for creating queries and reports.
 - Most of us learned formal report writing using Access.
- Often TWG gets tasked with fixing reports attempted by client users.
- Very limited accessibility from the web.

Summary: Where client has someone using Access for other tasks, keeping the reporting together in one application makes sense.

Crystal Reports

- Is the industry leader for custom reporting package.
 - Expensive and complex licensing at any level
 - Has enterprise-level features like Active Directory integration – but too expensive for TWG clients.
 - Just getting a quote with the right specifications for purchasing Crystal Reports can involve many hours.
 - Upgrade versions lack backwards-compatibility.
 - Can read non-RDBMS data like NT Event Logs.
 - Has the best report editing tool.

Summary: Best choice if client has or wants industry standard reporting package and has the money to pay for it.

Active Reports

- Is a developer-centric reporting set of tools.
- TWG has extended the basic package to create installable tools:
 - RPX Editor – Edit .RPX report template, similar to MS Access or Crystal Reports
 - RPX Load – DLL to enable web pages or other programs to run an Active Report programmatically.
- Low cost for client.
- Good range of export options (PDF, TIFF, XLS, DOC, etc.)

Summary: Best choice for most TWG client situations.

Report Rationalization

- Developing and using reports costs money
 - Software licensing
 - Consulting and development fees
 - Client input and review
- You can help clients get the most from that investment by:
 - Helping them identify the business purpose and usage for a report before it is created.
 - *“What decision are you going to make based on what you see on this report?”*

Report Project Initiation

- Talk through the project with the client.
 - Business Purpose
 - Business Usage
 - Report Format
 - Timetable and Budget
 - Identify who will review report drafts and validate the data during report development.
- Create AutoTask ticket outlining all these specifications.

Report Project Execution

- For complex reports, a visual 'mock-up' should be created for the client to 'proof' and approve.
- Multiple iterations of data query and layout are often necessary.
 - Generally, the better the project is defined and explained up front, the fewer iterations.
- Follow-up once report is in-production to get client to verbalize their satisfaction.

"That report you guys did for us saves us sooo much time. Thanks so much!"

Questions?

Questions for You?

- Tell me about the most recent time that you saved a client money?
- Tell me a story about how client users are so much better with the way things are now than the 'old way'.
- Tell me how you and TWG could do something that would increase our sponsor's annual bonus?