

Mi-Forms Case Study: Customer Relationship Management at ThotWave with Mi-Forms and the Logitech® io™ Pen

ThotWave, an innovative data warehousing and decision support services company, has implemented the Mi-Forms System and is currently capturing data using the Anoto functionality to efficiently send up-to-date information to for use in their in their Customer Relationship Management (CRM) System.

Objectives

- Same-day entry of collected information on prospects into the company's CRM System
- Eliminate manual transcription and reduce overall data entry time for both clerical staff and consultants.
- Transfer data to ACT databases with no human intervention after data capture
Allow data capture in a "natural" way using Digital Writing with a pen on paper process that can be used any where



"Many organizations have the constant struggle of gathering, updating and analyzing current information about their customers, contacts and prospects," said Greg Barnes Nelson, CEO of ThotWave, " And, as we have all come to learn, a CRM system is only as good as the data that is in the system. Once the data is in place then you can extract information from the system to conduct customer centric activities, prioritize an organization's actions and make decisions. But this process starts with a simple rule: first, you must get the data into the system."

"At ThotWave, we use Outlook as our key email communication vehicle. Additionally, we use ACT as one of our core technology components of capturing contact information on prospective customers, tracking the interactions with our customers and measuring outcomes of those interactions," added Nelson. "When the individual gathers that information at the desk, much of that is captured directly by keying into the computer. However, there are times when this is not the best way to capture data--and that is where the Logitech io Pen and Mi-Forms Software steps in to ensure we capture relevant information in a timely manner."

Tactics

ThotWave has a set of paper forms printed on Anoto patterns that the company uses to capture data with the Logitech io Pen. This pen on paper process is often used in customer meetings or settings when direct interaction with a computer-based system is inconvenient, unavailable or inappropriate.

"Sometimes firing up your laptop computer is not easily done, or in some cases considered rude," stated Nelson, "but writing your thoughts down on a piece of paper is completely acceptable and easily done with the Logitech io Pen.

At ThotWave, consultants gather information on paper forms that mirror several of the key subsystems of the ACT database including contacts, activities, notes and opportunities. The consultant simply writes on the forms with the Logitech io Pen and the next time the consultant is at his computer there is no keying of data into the system. The consultant simply docks the pen in the cradle, the ink is converted to images and text with the Mi-Forms Software and the data is then sent electronically merged with the ACT database.

Results

Nelson attributes the system to increasing the quality of data on customer contacts, the completeness of information on prospective customers and increasing the likelihood that the data will reach the computer system. “No matter how disciplined we are, sometimes a person can come from a meeting with great handwritten notes that never quite make it into the CRM system. With this system, that simply isn’t a problem.”

Customer and prospect information are organizational assets that are now in ThotWave’s CRM system,” stated Nelson. “This valuable information is no longer jotted down on the back of a napkin that gets lost on the plane. The information is in the pen and then in our systems and with that information we can serve our customers better”

Spotlight on ThotWave

ThotWave, named after the Egyptian god of wisdom, Thot (h), is a privately held corporation with a rich history of software excellence and integrity providing thought leadership in the business intelligence community. ThotWave Technologies provides data warehousing, decision support and analytics to energy, life sciences and financial services customers. With over 200 years of combined experience in data warehousing and decision analytics experience, ThotWave staff members understand what real world problems face our customers. Based on this experience, ThotWave was founded to provide the best solutions in the industry. Our data warehousing practice leaders possess an average of 15 years experience in delivering results. ThotWave’s corporate headquarters are located in Cary, NC and in cyberspace at: www.thotwave.com



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