

A D I T I



Initial Observations Toward Enabling Key Objectives for NFP

April 30, 2014

AGENDA

- 1 An Enhanced Aditi and “Systems of Engagement”
- 2 NFP 360: Our Top Level Understanding
- 3 Enabling Key Objectives and On-boarding Blueprint
- 4 Team
- 5 Next Steps

AN ENHANCED ADITI + SYMPHONY TELECA: EXPANDED ACCESS TO GLOBAL TALENT

Global Access To Innovation Talent

40

Global Offices

7500

Employees

23

Countries

Buenos Aires (DC)
Boston
Burlington
Chicago
Detroit
Mountain View (HQ)
Nashville (DC)

New Jersey
New York
Plano
Seattle
San Diego
Westford, MA
Providence, RI

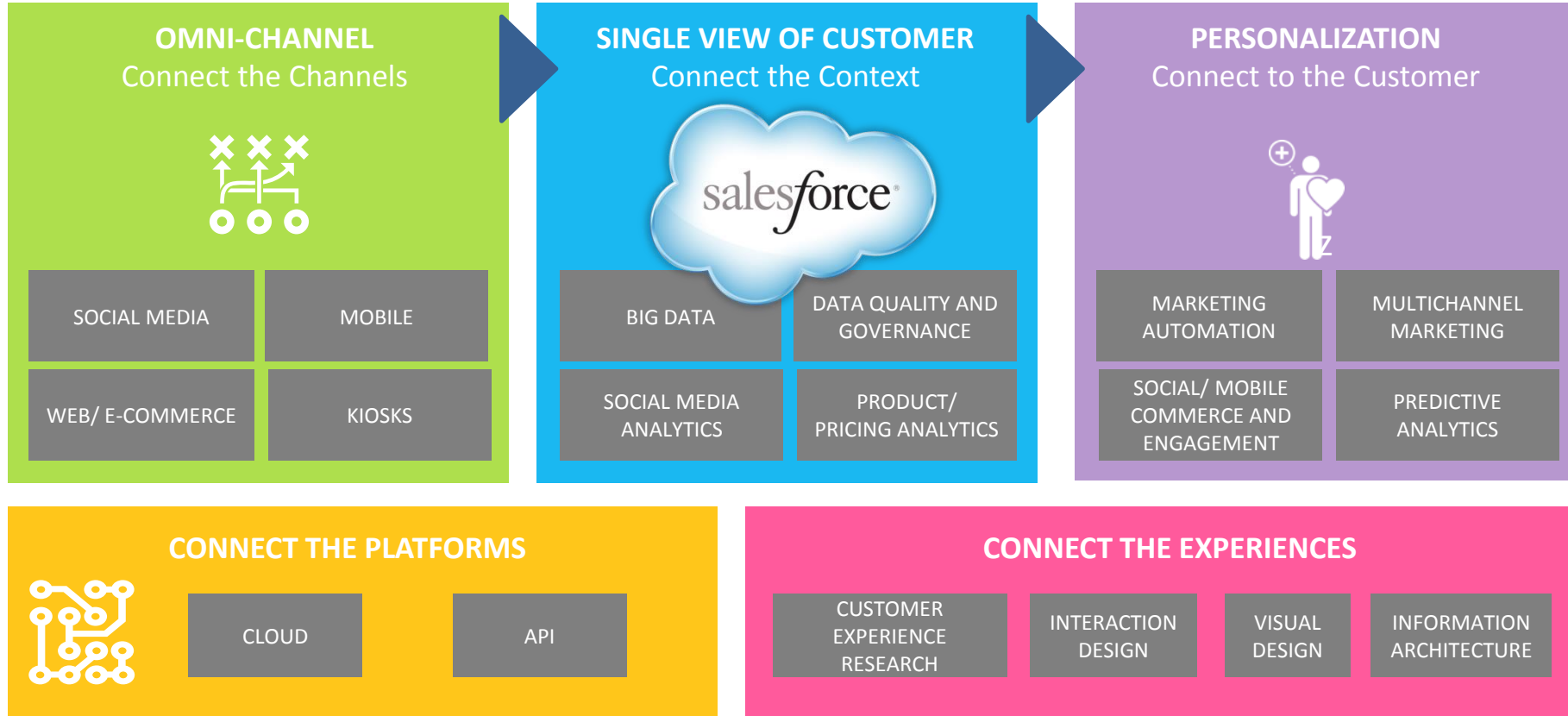
Berlin
Lodz (DC)
London
Malmo
Nizhy Novgorod (DC)
Nuremberg

Nuremberg
Oulu
Reading (DC)
Richmond
Rodionova
Tampere
Winchester

Bangalore (DC)
Beijing (DC)
Chengdu (DC)
Chennai (DC)
Coimbatore (DC)
Gurgaon (DC)

Geyongi-do
Hyderabad (DC)
Mumbai (DC)
Pune (DC)
Seoul
Tokyo

OUR FOCUS IS SYSTEMS OF ENGAGEMENT; CRM IS THE GLUE



NFP 360: OUR TOP LEVEL UNDERSTANDING*

CURRENT STATE

- Increase Scale of on-boarding Partner Firms
 - Increase business agility
 - Better manage Firm customizations
 - Enhanced end user experience
- Establish consistent Partner Firm and end-client data within and across lines of business
- Establish best possible sequence for porting/re-working legacy functionality
- Create right architecture and establish governance

DESIRED GOALS

- Scalable on-boarding team and streamlined solution
- Data integrity across systems
- Roadmap and process for identifying and managing enhancements
- Manage toward an architecture and create governance team(s) to handle change management and related processes

*Based on limited discovery and input to date; would recommend additional discovery meeting with a limited set of NFP 360 team members to tighten this understanding

ENABLING KEY OBJECTIVES

1 – Scalable On-Boarding Blueprint

- Data Validation and migration (ETL)
- Porting of logic (including workflow)
- Customization Framework
- Predictable pricing per partner firm

2 – Data Integrity Across Systems

- Define, manage data flow within NFP 360 and between NFP 360 and existing systems (such as Smart Office)
- Manage, improve tools/processes for monitoring data quality
- Define future state of data architecture for NFP 360 and master data

3 – Roadmap for System Enhancement

- Short-term enhancements including usability and visual force improvements
- Roadmap for sequencing porting of features from existing systems
- Architectural integration of NFP 360 into future state systems (eg. MDM)

4 - Architectural Guidance and Governance

- Architecture advisory as needed
- Establish right degree of governance, possibly to include:
 - Mgmt. of compliance (privacy)
 - Security processes
 - Problem escalation
 - Performance monitoring

Aditi proposes to focus initially on helping to build out a streamlined and cost-effective off-shore on-boarding process.

ON-BOARDING EXAMPLE SOLUTION



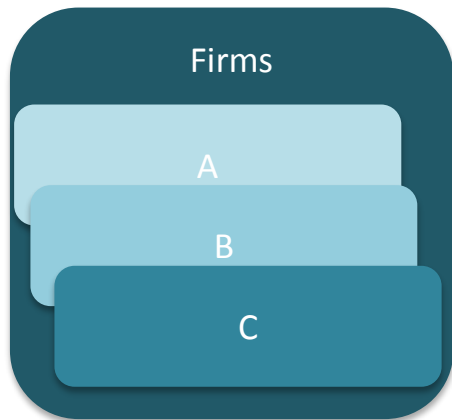
1 - Onboarding
Data Contract

2 - Data
Validation and
Compliance

3 - Intelligent
Data Mapping

4 - Data
Integrity &
Synchronization

5 - Adaptive and
Business Logic
Compliant UI



NFP 360 / Salesforce.com

Web Services

Data Integration & Synch

Triggers
(account, contact, oppty, quote, custom...)

Adaptable UI

Existing Systems

Smart Office

Other Existing Systems

Tools may be deployed to facilitate JSON,
Web services, and data integration utility

informatica Cloud

Optionally deploy UI toolkit

skuid

TECHNOLOGY OPTIONS FOR SCALING ON-BOARDING

1 - Onboarding Data Contract

- Define contract format (e.g. csv, webservice, RDBMS) with flexibility to define custom data attributes, enabling changes in underlying SFDC schema

2 - Data Validation and Compliance

- Destination validation (SFDC)
- Pre-loading validation (e.g. SFDC onboarding web service with data pre-load validation, rollback and return load statistics)

3 - Intelligent Data Mapping

- As Firm data is populated in Salesforce prevent duplication of existing data
- Call to necessary systems build appropriate object relationships (Account, Contact, Opportunity, etc)

4 – Data Integrity and Sync

- Define data master schema components
- Define integration contracts
- Build custom integration(s) (e.g. custom webservices) or leverage existing tools (e.g. commercial ETL tools)

5 - Adaptive and Business Logic Compliant UI

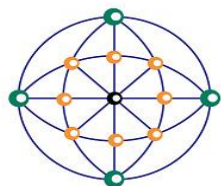
- Firms with specific business logic and/or look & feel are able to better define UI layouts (conditional field logic), business logic (e.g. XML driven UI)
- Increase user adoption, enhance usability and workflow management

Reduce time and effort to onboard firms, ensure Firm data compliance, manage Firm business logic at scale.



Brian Clift,
Senior Salesforce
Technical Consultant

Brian Clift has served over the past 20 years as a architect, lead developer, independent consultant and project manager. In the most recent 7 years, Brian has served as a Salesforce.com lead developer, project manager and architect on large, complex and custom projects for companies such as Staples, Hewlett-Packard, Level 3 Communications, Motorola-Mobility, Qualcomm, Citrix and others.



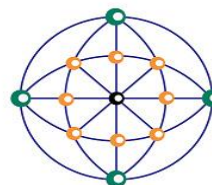
Onkar Kumar
Senior Salesforce
Architect

A multi-skilled Salesforce professional with good all-round Functional and Technical expertise. Extensive experience on Salesforce - sales cloud, service cloud and force.com platform. Recent experience with clients like Sony, Cognizant, VMWare Currently leading a approx. 20 developer Salesforce team at Sony. Led Salesforce center of excellence team at HCL, grew team from 1 to 150 member team.



Jonathan Weinstein
Business Consultant

Jonathan has been engaged in technology marketing, product management, and business development for over 20 years and is expert in online services business. He was a Co-Founder VP at Jobster.com; Director at eShop (acquired by Microsoft in 1996), and a Director of Product Management for 8 years at Microsoft.



Chandra Kanth
Salesforce Developer

Experience in End to End Implementation, Integration and Production Support. Proficient in using Apex and VisualForce. Experience in migrating data using Data Import Wizard and Data Loader. Profound knowledge in Workflow Rules, Validations and Formulas in Salesforce.



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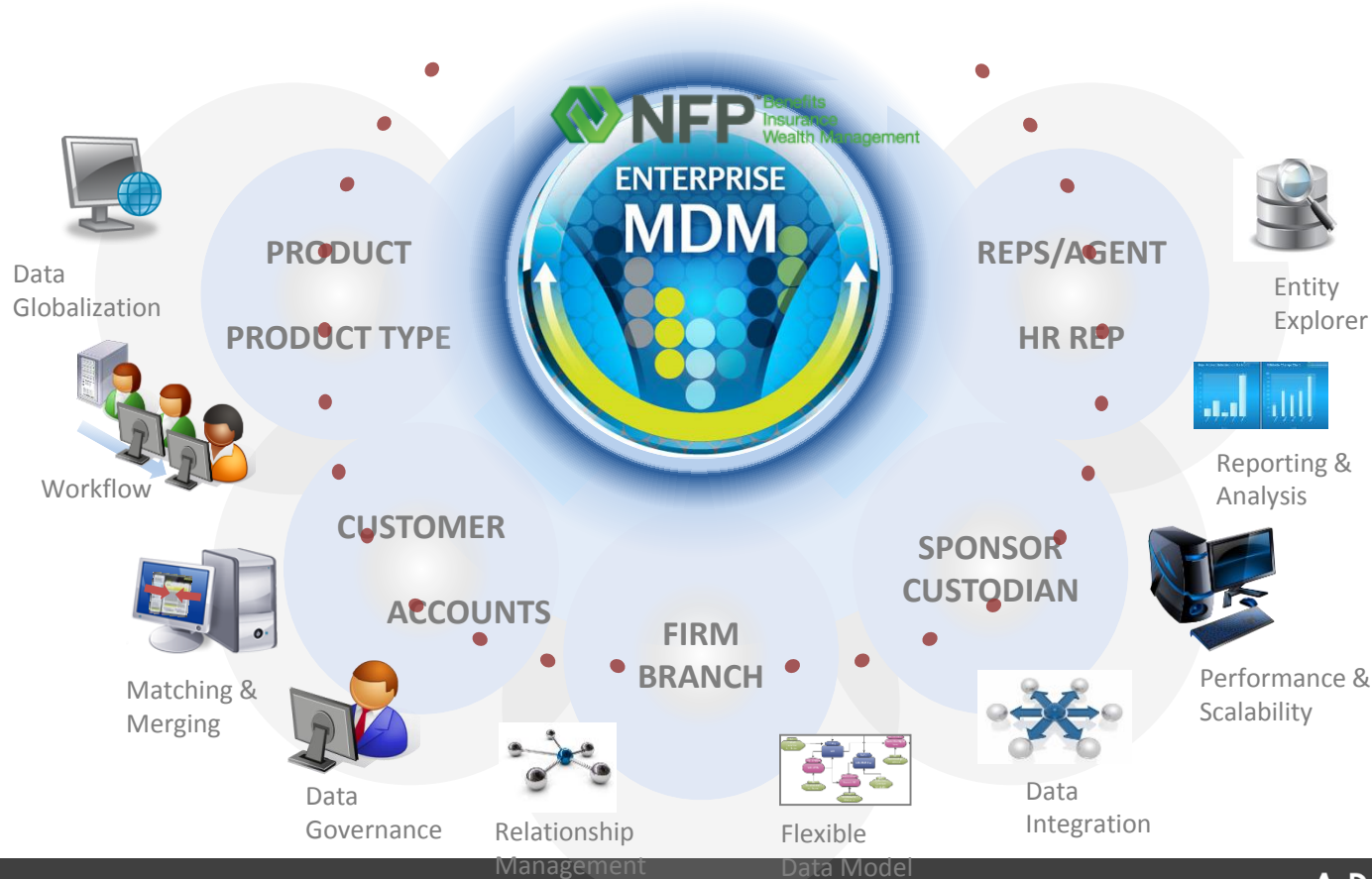
Managing your Corporate Master Data Assets

The Benefits of Riversand Master Data Management Solutions



Powering Accurate Master Data

RIVERSAND'S SOLUTION FULLY ENABLES MULTI-DOMAIN MDM FOR NFP'S LINES OF BUSINESS



RIVERSAND: THE HIGHEST-RATED PURE-PLAY MDM PROVIDER

- Riversand established as the most innovative company in the “Leaders” Quadrant
- Gartner’s MQ report highlights Riversand's strengths:
 - Business Strategy
 - Market Growth/Momentum
 - “Leader” functionality and product strategy
 - References and customer base
 - Solid partner program

Gartner

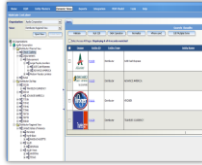
MAGIC QUADRANT

Figure 1. Magic Quadrant for Master Data Management of Product Data

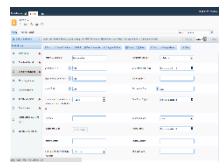


MDMCENTER SOLUTION OVERVIEW

Data Views



Vendor Portal



Reporting



Advanced Search



Data Quality Management

Name	Status	Other Attributes
...
...
...

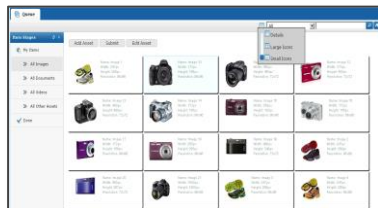
Data Globalization

Locale	Name	Status	Value	Translate
en_WW - English World Wide	Features & Benefits	1	...	Translate
fr_WW - French World Wide	Features & Benefits	1	...	Translate
es_WW - Spanish World Wide	Features & Benefits	1	...	Translate
nl_NL - Dutch Netherlands	Features & Benefits	1	...	Translate

Productivity Tools



Digital Asset Management



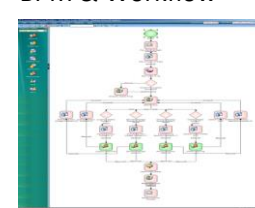
Print Publishing



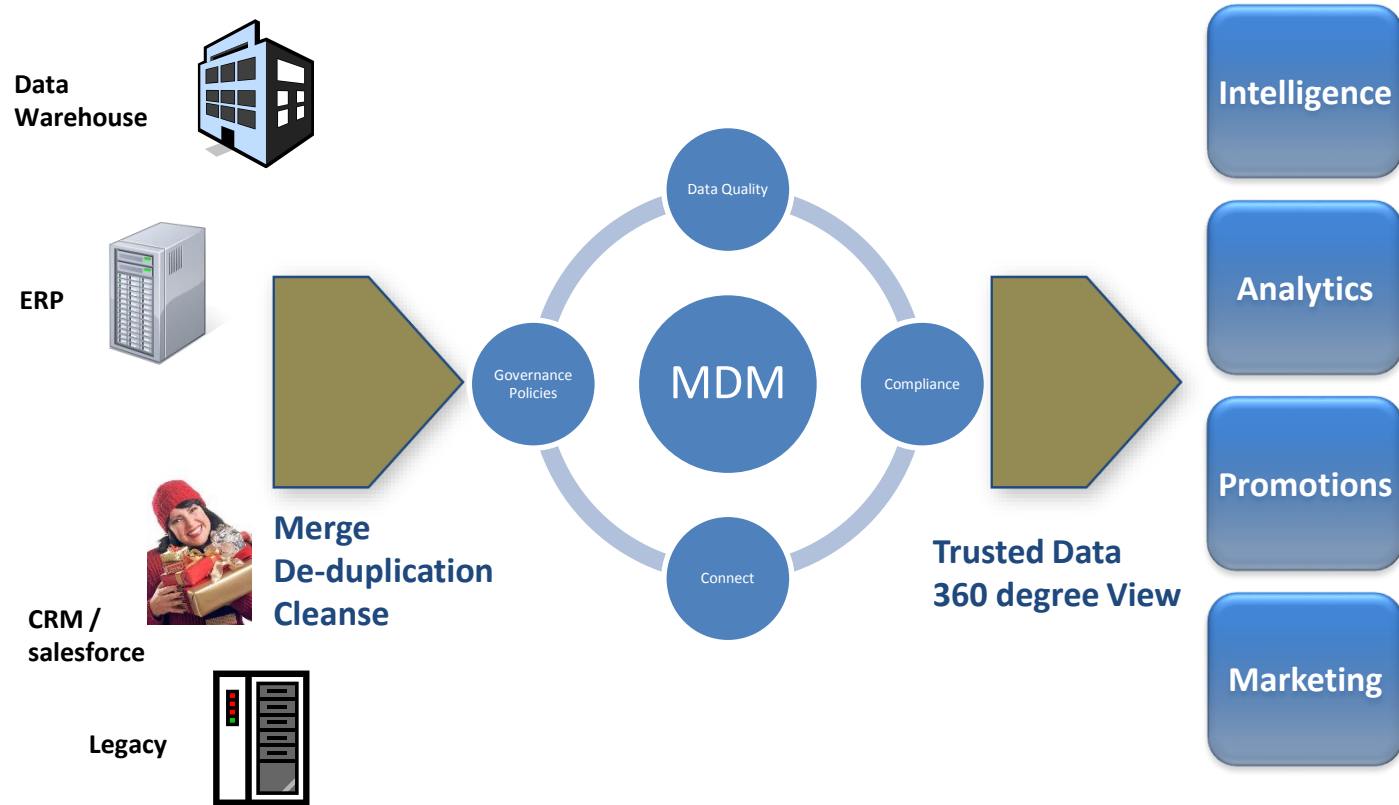
Relationship Management



BPM & Workflow



RIVERSAND MDM PLATFORM



DISCUSSION AND NEXT STEPS

- Feedback on NFP 360 priorities
- NFP 360 team input
- Firm discovery (rapid)



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2010 PARTNER OF THE YEAR
Windows Azure Platform
Winner



Top 10
Mobile Companies
Top 5
Outsourced Product Development Companies

