



Crossing the Chasm

*How to be Pragmatic About
Service & Technology*

Atlanta – May 17-19, 2006

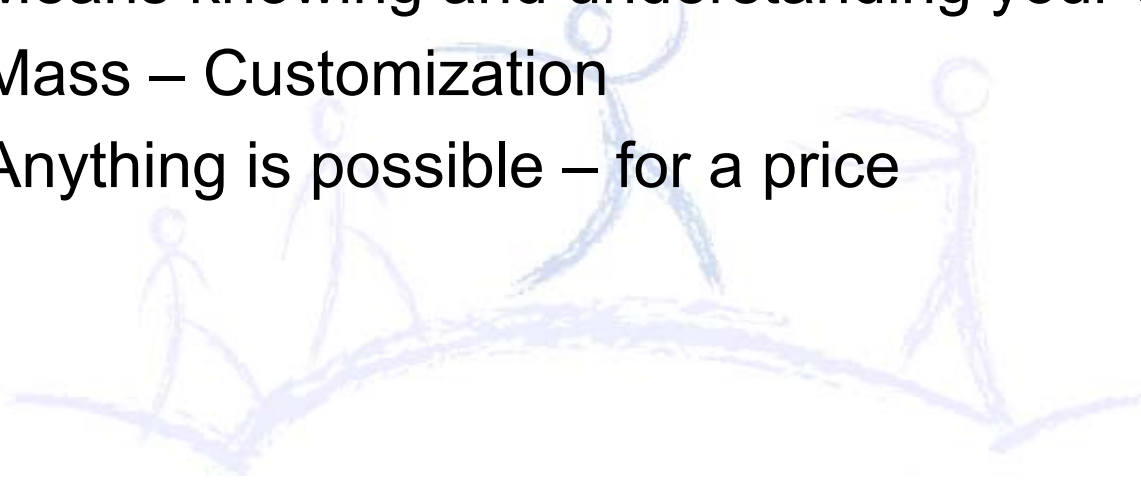
Creating Customer Centric Reports

Presented by

Beth Kyle and Amy Millar

- Agenda
 - What is Customer Centric?
 - Common Language
 - Learn – Gather Requirements
 - Build It! – Implementing the reporting process
 - Up and Coming Features in iBank

- Definition of Customer Centric -
 - Means knowing and understanding your client
 - Mass – Customization
 - Anything is possible – for a price



Cornerstone and Data Management iBank Travel Management

- Pre-Defined/Canned
- Filters/Parameters
- User Defined Reporting
- Broadcast Reporting

- Listen to Client and Ask questions
 - Why do they need the report? What do they use it for?
 - Did they receive the same report before? What were the positive and negative aspects of the previous reporting procedures?
 - Need vs Nice - Understand their priorities

– Show samples

- Get a sample set of Pre-defined reports
- Show some other User Defined reports
- Build a report and run it on the spot

– Get Feedback

- Does the pre-defined report give them enough data?
- Is the User Defined report structured in a useful way?
- How can you make it better?

- Fields VS Filters
 - Know what is available
 - Identify specialized fields
 - Establish a Process to get the data
 - Some times it isn't so much what is on the report, but what is NOT on the report

- You are ready to begin building!

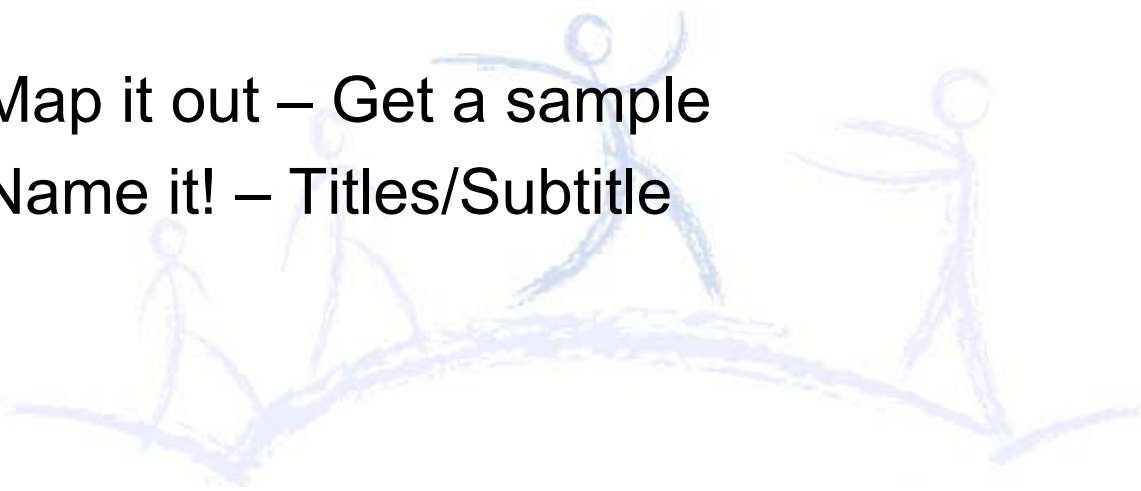
- Know when you need to build a User Defined Report
 - Pre-defined
 - Unique Data
 - Unique sorting/subtotaling
 - Data Dump

– Pre-Defined Reports

- Travel Management/Corporate User
- Classic iBank
- Site Map

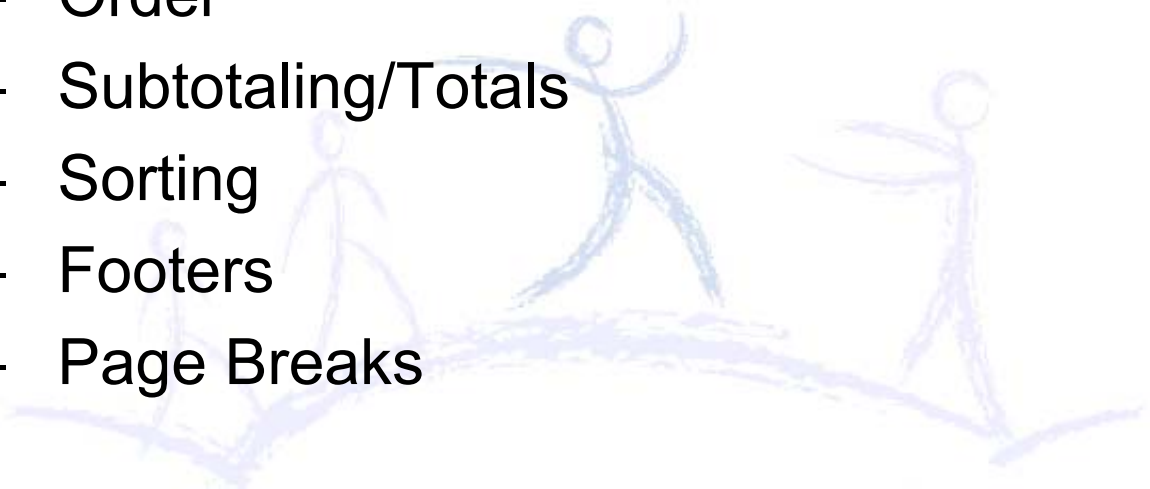
– Creating a User Defined Report

- Map it out – Get a sample
- Name it! – Titles/Subtitle

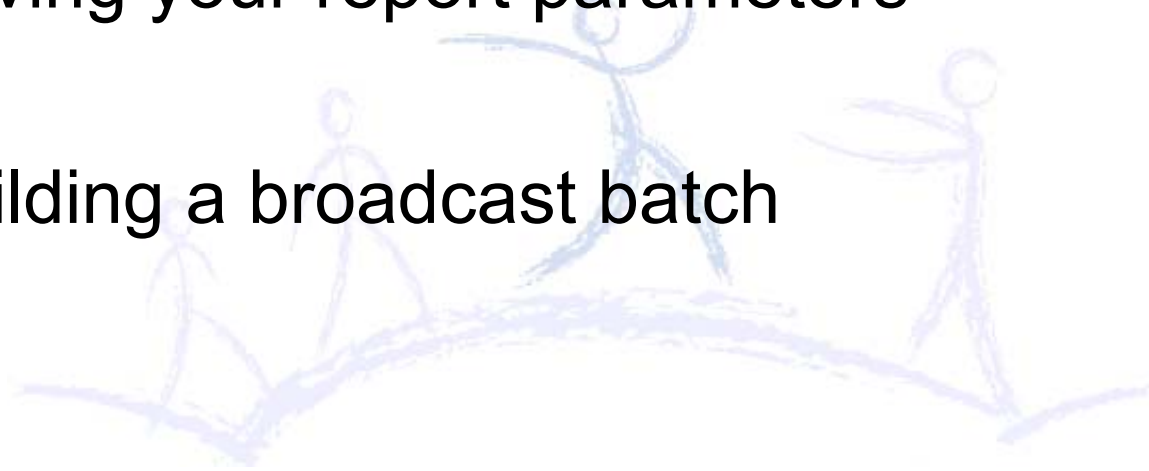


- **Data Elements**
 - **Travel Components**
 - » Trip
 - » Air Routing – Leg/Segment
 - » Hotel
 - » Car
 - » Service Fee
 - **Udids/Special Fields**

- Other Decisions
 - Order
 - Subtotaling/Totals
 - Sorting
 - Footers
 - Page Breaks



- Saving your report parameters
- Building a broadcast batch



- **New Easier Interface**
 - Drag and Drop
- **New Summary Level Combined**
 - Air/Car/Hotel Summary Combined
- **Merging of the two**
- **Feedback**

- What is Customer Centric?
- Common Language
- Learn – Gather Requirements
- Build It! – Implementing the reporting process
- Up and Coming Features in iBank

Q & A