



*First View*TM

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Welcome to the third issue in 2003 of *First View*. Our objective, as always, is to keep you informed of developments here at First Choice Software, and to recount what we've been up to since the last issue. To that end we've added a new section, "From the CEO's Desk", and included a brief report on the User Group meetings we hosted in October. We also thought it might be useful to revisit the **FCFL** platform from both a technical and a business perspective: what is it, and how does it benefit your CRM environment?

Because the initial note from Newt's desk covers many new and exciting developments at First Choice, and because we have a lot to tell you about **FCFL**, we've decided to discuss only the motivations behind **FCFL**, i.e., the business drivers and high-level technical context (what and why) in this issue. That means this issue of *First View* will not contain the regular, in-depth Technical Corner section. In the next issue, to be published early 2004, the *First View* Technical Corner will return to delve more deeply into the technical aspects (how and why) of **FCFL**.

This issue of *First View* discusses:

[From the CEO's Desk: The Shift in CRM Solutions Revealed: The Engine that Powers First Choice Applications](#)
[Employee Profile](#)
[New Services, Features, and Products](#)
[Report: Regional User Group Meetings](#)

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From the CEO's Desk: The Shift in CRM Solutions

The last six months have been hectic here at First Choice but for all the right reasons.

A substantial number of our customers are implementing First Choice thin client solutions. Feedback from these customers has been terrific and it confirms that we met our design goals of delivering high performance, scalable, and flexible Internet solutions for Support, Quality, and Logistics. In this issue we will share some of the architectural innovations that made this possible.

In October we sponsored User Groups in San Francisco, Chicago, Atlanta, and Boston, and engaged directly with customers on key issues facing Clarify users. We discussed alternative ways to solve common issues faced by our customers, and more important, gained insight from customers on where they would like to be over the next 12-24 months. This feedback is invaluable. First Choice remains totally customer driven in our development pursuits, and we're already planning and implementing new capabilities in response to the input. The User Groups confirmed two additional things: Clarify users are still wrestling with strategic decisions related to moving to thin client environments; and our customers have found that First Choice is delivering superior value, performance, and functionality.

More good news: our revenues and pipeline are beginning to grow rapidly, as we introduce new products and as more Clarify users become aware of the comprehensive First Choice solutions. I'm the "new guy," but one thing has become very clear to me over the last six months, and it was reinforced at the User Groups: First Choice remains one of the best-kept secrets in the Clarify market. To change that, we intend to increase our communications and promotional activities, to make as many Clarify customers as possible aware of the powerful and cost effective alternatives we offer to solve critical needs.

Since I joined the team, we have been developing an aggressive First Choice growth strategy, and over the next few months we will be communicating specifics of the plan, including a number of exciting new product deliverables. We discuss that in our plan's Executive Summary (excerpts below).

"A shift is occurring in the customer relationship management (CRM) market. Empowered by innovative companies such as SalesForce.com and Upshot, which focus on the sales force automation problem, companies of all sizes are shifting rapidly towards Internet architectures, and to software sold as services rather than as expensive enterprise licenses. Aberdeen Group estimates the shift is accelerating so rapidly that of the \$5B+ in CRM revenue forecast for 2006, revenues from hosted, subscription-priced software will exceed purchases of software licenses for the first time ever. A huge majority of companies (89% of those surveyed by Aberdeen) are now looking to solve their more complex customer and field service management problems via this hosted service model."

"First Choice intends to ride that wave of change. We have built a reputation for delivering CRM software and application tools into the AmdocsClarify user base that demonstrably improve enterprise customer and field service applications. Our customers have been telling us all along about the issues changing the CRM landscape.

First generation CRM suites are ... **too complex, too expensive to license, too expensive to implement, and too expensive to support.**

Early solutions were designed and implemented before the Internet could support "mission critical" applications. Today the Internet is rapidly becoming the preferred platform for applications, but it is very difficult to transform first generation solutions, such as Clarify's thick client product, into Internet capable solutions; it requires tremendous investment on the part of vendors, and even greater expense and disruption to their customers.

Often, enabled by the Internet, companies are rapidly dispersing and outsourcing key business functions that are central to managing customer interactions. First generation CRM applications are not well suited to support widely distributed business operations without considerable investment in communications infrastructure. Even large enterprises are wrestling with how to remain agile while tethered to first generation applications."

“First Choice has developed a new approach that would avoid these pitfalls. The First Choice **FCFL** Platform designed to operate in a native Internet environment and based on simple, yet powerful service based architecture, deliver solutions that offer high performance, flexibility, and ease of use.”

“In the latter half of 2002 the company began shipping a suite of customer and field service applications based on the First Choice platform. These applications were entirely Internet based and operated against native database servers housing the Clarify data model and client information. These advanced applications gave Clarify customers, for the first time, a deployment model that required only an Internet connection and standard browser at the customer and agent location. Since 2002 the company has extended the functionality of the original applications and added several new applications based on customer demand. Customer feedback from mid-sized to very large deployments validated the company had successfully met and exceeded the original design goals, and many have already standardized on the First Choice offerings for their entire customer and field service management needs.”

“While we remain strongly committed to the Clarify customer base, our management team is also focused on market opportunities created by the fundamental shift occurring in the CRM market. In 2003 the company began development of a First Choice alternative to the Clarify thick client. This was the first step in a longer-term development strategy. As this development nears completion we are very close to delivering the final component needed by First Choice to offer the industry’s first comprehensive hosted-service solution for customer and field service applications.”

“In 2004, when this development is completed, the company intends to launch a First Choice hosted customer and field service suite that:

- Can be delivered as a hosted service without sacrificing functionality
- Is a proven, sophisticated, extensible platform addressing simple and complex needs
- Delivers high performance and stability, key concerns of hosted users
- Has a substantial reference base that provides a high degree of credibility”

I believe this offering is well timed, leverages First Choice strengths, and reflects market conditions. I also believe completion of this development will bring exciting alternatives to Clarify users and deliver faster performance, greater flexibility, and much lower costs. We’ll be happy to discuss what this might mean to your company.

In closing, I’ve already said things are hectic at First Choice; the good news is we’ve only scratched the surface. I sincerely thank all of our customers for their support, and loyalty, and we look forward to delivering even greater value to you in the future.

Revealed: The Engine that Powers First Choice Applications

In the “From the CEO’s Desk” article we mentioned three business drivers that are influencing CRM investments, and how companies can best leverage these investments;

Enabled by the Internet, many companies are rapidly dispersing and outsourcing key business functions that are central to managing customer interactions. These customers need thin client solutions that deliver enterprise-scale performance,

First generation solutions, such as Clarify’s thick client product, are difficult to transform into Internet capable solutions. Thus, alternatives are being explored,

CRM suites are in general too complex, too expensive to license, too expensive to implement, and too expensive to support.

Since 2002, First Choice has been delivering Internet based solutions (the *fcClient* family) that are designed to: deliver speed, robustness, and scalability; leverage investments made in legacy thick client customizations; and facilitate the rapid implementation of new applications and extensions ... all at a fraction of the cost of available alternatives.

The benefits of the First Choice solutions can be easily demonstrated, but the question many customers ask is, “How is First Choice able to consistently add so many new, useful features so quickly?”

The answer to the question is simple. It's called **FCFL**.

FCFL stands for the **F**irst **C**hoice **F**oundation **L**ibrary, and is First Choice's architecture, developed from the ground up, that allows companies to write the solutions they need without having to go through the pain and expense that accompanies the design and implementation of new Clarify applications.

Many customers have leveraged the power of **FCFL** to improve their Clarify systems, yet customers often know little or nothing about the underlying architecture of **FCFL**. We thought that it would be useful to take the time to explain **FCFL** in greater detail. This article focuses on the motivations and overall goals of **FCFL**. In the next issue of *First View* we will delve more deeply into the technical design of **FCFL**.

Why Write FCFL?

This is a question we often hear from prospects and customers. Developing enterprise architectures such as **FCFL** takes considerable time and expertise. This was not a task we wanted to undertake if it wasn't truly necessary. After speaking with a significant number of Clarify users it became clear ... it was. Only by developing a true Internet-capable architecture designed for enterprise applications could we meet the diverse and demanding customer requirements we discovered.

In keeping with the holiday season (and with apologies to Dickens), we'd like to share the design goals and key features of **FCFL** we set out to design and build for Clarify Past, Clarify Present, and Clarify Future.

Clarify Past

It is impossible to escape the past. Virtually every Clarify customer has spent a significant amount of money and time developing a system that is highly customized to their specific needs. **Customers want to protect their investment** as they move to thin clients, and reuse the considerable investment they have made in their business systems. This past legacy is virtually impossible to ignore. Nor, in most cases, should it be ignored. **FCFL** was designed and written with the knowledge of this past Clarify legacy.

While **FCFL** is an object-based architecture, and can be programmed as such, it also provides a programming interface, **virtually identical to the original ClearBasic language!!** This means that your existing staff can rapidly adopt **FCFL**, becoming more productive with minimal training. This gives you the best of both worlds. Your converted customizations are run on the next-generation **FCFL** engine, while greatly reducing the cost and time of conversion.

To further speed conversions, First Choice offers *fcCodeConverter*: a compiler that automatically converts ClearBasic programs into **FCFL**-based programs, in a variety of languages, including JavaScript, Visual Basic, C#, and more. First Choice also developed *fcFormsConverter*, which instantly converts any Clarify thick client form to an HTML equivalent.

Clarify Present

Today, customers want to move thin. Whether using prepackaged thin client solutions, such as *fcClient*, or using custom-written portals, integrating Clarify systems to the Internet is a top priority. What they'd like to avoid, however, are costly Clarify and database upgrades just to get to the point where they can begin. They want new thin client solutions on their existing platforms! **FCFL is Clarify and Database version independent.** This enables customers to implement thin client solutions now, without having to upgrade to Clarify 11.5 or 12.0. Further, **FCFL** uses a database abstraction layer to insulate applications from underlying databases, permitting thin client solutions developed on **FCFL** to work with any database, including Sybase, MSSQL, or Oracle. The same **FCFL** code and executables will work with all of them! **FCFL** is designed so that the differences (Clarify version, Database version, and type) are hidden: **FCFL** handles the differences for you.

Performance is a major concern for companies migrating to thin clients. While most people hope their thin client implementations perform adequately; customers of First Choice's thin client solutions are pleased to discover *fcClient* performance is consistently equal to or better than current Clarify client/server implementations. This is due, in large part, to the performance effort we spent in developing **FCFL**. We spent more time on performance than on any other area of the design. **FCFL** contains special data structures, algorithms, caching structures, and more. All of these have

been added to ensure that the **FCFL** programs you use are the fastest that they can be (see example in chart below). There is no faster alternative available to you today.

Site/Contact	Create Case	Create
First Choice & contact	.16 secs/case	.17 secs/site

Companies are presently wrestling with issues of globalization, and are faced with the necessity of delivering service and support on a global basis, through highly dispersed call center operations. To minimize training and errors, and drive productivity local language support becomes a major factor. **FCFL** addresses the needs of companies working in a globalized business environment by having integrated support to internationalize and localize your programs and web pages, including Unicode and message cataloging. Localization is not an afterthought with **FCFL** – it was built in.

Expanded global markets, reliance on channel partnerships, and business-to-business collaborations are making secure and restricted data sharing a must, not a “nice to have.” Clarify users have clearly indicated they need to be able to partition, or segregate their data, often maintaining multiple user data in one database with restricted access by groups of specific users. **FCFL** does all of that for you. Managed by simple customer defined rules, **FCFL** partitions the data and restricts access accordingly. Solutions are then implemented, either as *fcClient* applications, or custom applications written by your programmers, **WITH NO REGARD TO THE PARTITIONING!** **FCFL** manages partitioning and data access for you automatically, based on your business rules and without any special programming required.

Clarify Future

The most important consideration, for most customers, is the future. Where are their implementations heading and how effective will their solution be at responding to upcoming changes? First Choice believes software should enable, not impede, business change. Our goal with **FCFL** was to provide: a flexible platform for adding extensions and new solutions; a way to leverage current investments; customers the freedom to plan upgrades on their schedule, not the vendors.

Flexibility is a major consideration, as most customers will want to expand the functionality they currently offer their customers. **FCFL** allows new functionality and applications for Clarify to be built with unparalleled speed and simplicity. Since new applications often require integration of Clarify with other operational systems, the functional (business process) abstraction layer offers a straightforward integration point. And for those customers who might choose to move off of Clarify (not our favorite choice, as we like Clarify), we understand that this is a business reality. **FCFL** can insulate the customer and agent-facing applications from the underlying application or database, which can drastically reduce conversion and training costs.

At some point, most Clarify customers will upgrade some portion of their CRM platform. Usually this upgrade will be to a new Clarify version. In many cases this will also require an upgrade to a new database version (or type). First Choice believes that we should do everything possible to protect current investments and to help make this process easy and quick. Since **FCFL** code works at **ALL** versions of Clarify, you will not have to upgrade **FCFL** should you upgrade Clarify, nor will you have to rewrite your **FCFL**-based customizations for new Clarify versions. If customers need to take their existing implementation and modify it, over time, to operate on a different database system, **FCFL** can do that for them as well, again without impacting the applications and customizations.

At First Choice we also believe in adhering to standards as a way to further protect our customers’ investments. Wherever there is a good standard or technology available, we will use it. We have designed and based **FCFL** on the Microsoft COM and ADO standards. Microsoft spends millions of dollars each year improving the COM and ADO products and these improvements are readily leveraged by **FCFL** on behalf of our customers. For instance, in early 2004 we will ship a new version that is based on .NET. This new .NET version will include both ASP.NET and ADO.NET modules. We anticipate the new release will be faster than the current version of **FCFL**. In addition, the new release will support both ASP and JSP web environments, and will include enhanced transactional control, better

resource pooling, and support a multi-threaded application model, to allow for massively concurrent applications. All of these advantages will be directly leveraged by **FCFL** without the customer having to change their applications.

The key to our being able to maximize the value of our customers' investment and provide a flexible and robust platform is attributable to **FCFL's 100% First Choice code**. There is no Clarify or Microsoft intellectual property in our product. We can, and will, add features and functions to **FCFL** as our customers require, without being dependent on outside intellectual property.

In summary, FCFL is an exciting, powerful, 100% First Choice framework, designed for superior performance and ease of use. **FCFL** has been designed with your working environment in mind. Features such as internationalization, localization, colorization, and data restriction/partitioning are provided as base features of the environment. And (with or without First Choice conversion tools) you can quickly and easily port your existing ClearBasic programs to the new environment.

Not only does First Choice use **FCFL** in our thin clients (*fcSupport, fcQuality, fcLogistics, fcCallCenter, fcSelfService, and fcAdmin*), our customers use it to quickly and easily develop programs for all of their Clarify needs. **FCFL** is fast becoming the preferred choice for Clarify-based thin client solutions: at a price even Scrooge would appreciate.

Employee Profile: Bruce Flory



Bruce Flory, a thirty-year veteran of the high technology and enterprise software market, joined First Choice this past May.

Bruce is responsible for the development of First Choice's growth strategy, for getting the First Choice message out, for execution of sales and marketing programs, and for increasing awareness of the breadth and depth of our solutions and excellent support.

Bruce has held senior executive positions for over twenty years, in sales and marketing, business development, and general management for Intel, Harte-Hanks, BMC Software and Tandem Computers. Most recently, Bruce served as VP/Marketing and Business Development with Pervasive Software, and was a key architect of business strategies that resulted in significant revenue growth and a five-fold increase in stock value. Previously, he was Senior VP/Marketing for Objectspace Software, and helped guide the company's transition from consulting to recognized leadership in Internet-based business collaboration through web services technology. He was also a key contributor to the company's preparation for IPO. In earlier stints at Tandem and Sterling Software, Bruce formed business units that successfully and profitably achieved more than \$100-million in sales over a three-year period; led the development of long-term strategies in the application development space; and was responsible for integrating multiple acquisitions into coherent product lines serving Global 2000 customers.

Bruce earned his undergraduate and MBA degrees from St. Edwards University and is currently serving on the University's adjunct faculty in the executive MBA program. Bruce is married with two children. Bruce is excited by the opportunities at First Choice, and looks forward to working with First Choice and Clarify customers.

New Services, Features, and Products

Education Offerings - We have just finished conducting our most recent **FCFL** and Thin Client Programming Class. We plan to offer it again early next year, probably on the West Coast, as we have had many requests for a class in that region. If you would like more information on our education offerings, please visit www.fchoice.com/FC_Services_ED.asp.

New Features - Since publication of the previous issue of *First View*, we have added a number of new features to existing products:

Attachments Anywhere for the thin client (*fcClient*)

As with Attachments Anywhere for the thick client, this feature allows users to attach documents to any object in the system, to automatically share attachments on a central attachment server, and to view and download them.

Flashes Anywhere for *fcClient*

As with Flashes Anywhere for the thick client, this feature allows flashes to be added to any table in the system; it also allows any single flash to be added to as many objects as desired.

Full Text Search (FTS) for *fcClient*

*The *fcClient* now supports Full Text Search.*

On-line Help for *fcClient*

*Any page in *fcClient* can point to a .htm help file.*

Resource Configurations for **FCFL** and *fcClient*

This feature allows Clarify system administrators to provide groups of thin client users with custom versions of any web page, including the console.

New *fcAdmin* functions for **FCFL**

- create and update users
- create, update and delete queues
- create and update status codes
- create and update Clarify application lists (GBST lists)
- create and update user-defined lists (HGBST lists) using an intuitive, tree-view control

-no_cache option for **FCFL** and all *fcClient* applications

*There may be times when a system or network administrator would prefer **FCFL** not to write, or read, a cache file; the -no_cache option is provided for this purpose. Setting this switch means the one-time application startup will take 5-10 seconds longer while data are read from the DB, but in most deployments that should not be an issue.*

New Products - We are happy to announce the following new products or product versions:

FCFL API Toolkit for ClearContracts

*The Toolkit for ClearContracts, containing 40 APIs, has been ported to **FCFL**.*

Personal Business Rules version 2.0

This product, formerly known as Interested Parties, has been renamed to more accurately reflect its function, as well as enhanced for this version. PBR allows individual end users to create and maintain their own business rules within the framework of what the system administrator permits, and supports notification using alternate email addresses. While the PBR daemon is designed for high-performance operations, multiple daemons can be run in parallel where the workload requires it.

Upcoming Products - Finally, some of the projects we're working on right now are:

XML Gateway

Designed as a general-purpose interface between your Clarify system and any other application or process, the XML Gateway reads XML files, invokes APIs, executes SQL, stores variables for piping between operations, and generates output in several formats, including XML, database, email and file.

Design for 1Q04 port to the .NET environment

Support for .NET is the logical next step for our COM-based platform, tool kits and applications. The design phase is well underway, and we have recently hired an engineer with extensive .NET expertise to assist with this project.

First phase of *fcContracts*

Coding has begun for this newest member of the fcClient family, and we expect to deliver an initial version of the product in 1Q04.

Additional *fcAdmin* functions

As you can see from the New Features list above, we've been working hard to provide the full set of administrative functions within the FCFL environment; we're focusing now on the collection of functions comprising Product Manager.

Super-Scalable Rule Manager

We're developing a new, industrial-strength rule manager based to a large extent on work we've already done building PBR.

You can learn more about our longer-term product plans in the report from the User Group Meetings below.

Report: Regional User Group Meetings

In mid-October we hosted User Group meetings in four cities: San Francisco, Chicago, Atlanta, and Boston. Together we explored some of the key issues common to nearly every Clarify deployment, and discussed possible solutions; customers shared experiences, both asked and answered questions, and exchanged ideas. In each city, one case study of a successful customer implementation of First Choice thin client technologies was delivered. These presentations, along with the FCS slide set, may be downloaded at www.fchoice.com/download/ug03_presentation.zip.

We also asked participants to help us decide which projects to pursue for the remainder of this year and into 2004, and have already built the User Group responses into our development calendar. Participant selections may be viewed at www.fchoice.com/ug/dev_dollars.asp.

It seems like we all learned a lot from each other, that these were useful meetings; and we heard numerous requests for First Choice to help organize regular local User Groups in each of the regions we visited. Customers appear to be keenly interested in getting together, probably on a quarterly basis, to discuss their implementations, to find out what's new in the Clarify and First Choice worlds, and to share relevant information.

We are more than happy to facilitate such meetings. We've encouraged participants to register for local User Groups at www.fchoice.com/ug/register.asp, and we would like to extend this invitation to all of you who were unable to attend the October meetings as well; moreover, you should feel free to pass this URL on to anyone else you think might be interested in joining such a group. We will follow up with registrants to coordinate the process of getting groups off the ground, initially in the regions we visited last month, but eventually wherever customers would like them to be. We want to emphasize that we intend these to be genuine User Groups: users will determine the nature of each group, define and develop meeting content, and provide meeting venues.

We would like to thank all of you who did participate in the User Group meetings: it was very good to meet you, to hear from you, and to learn how we can better serve the Clarify CRM community.

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