

Tour de Force, Inc.



# Statement of Direction

Product Strategy and Vision for Tour de Force 2018

October 2017

*NOTE: This document reflects current release objectives as of October 2017. This document is not intended to be a deep dive on specifications related to features. Additional features could be added at a later date, amended or deprecated based on customer demand.*

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## Welcome

Welcome to the Tour de Force Statement of Direction. The purpose of this Statement of Direction (SOD) is to outline the planned direction of areas of focus for Tour de Force Inc. The delivery of this document is to ready our customers and partners for the plans and guidelines to maximize the value of their investment and at the same time keep them informed of the planned changes coming in the future release.

Tour de Force, Inc. provides a highly flexible, comprehensive and affordable business solution that is designed with our customers in mind. In conjunction with the direct integration to a customer's ERP system, Tour de Force is designed to:

- *Provide a complete CRM, Business Intelligence (BI), and Marketing Automation solution that allows users to become more efficient and effective in their daily routine*
- *Provide substantial reporting capabilities either through the BI summary or grids that can be viewed at a Company, Sales Rep, Customer, Contact, Vendor or even Opportunity level or through the BYOR (Build Your Own Reports) module, which allows for data capture and review at any level*
- *Provide a configurable system that allows users to adjust on the fly with the changing markets and keep up with key metrics that drive successful growth*
- *Provide Business Process Optimization tools that can 'fill the gaps' between a CRM and ERP system, including modules such as Quote Manager, Support, Tickets, Literature, and Event Management*

## VISION

Provide a Complete CRM, BI, and BPO (Business Process Optimization) solution that will allow users to become more efficient and effective through any choice of deployment, and via any device allowing users to:

- *Have a single view of customer, prospect, or vendor sales data and information*
- *Gain customer insight using our integrated BI tools to drive better informed decision-making*
- *Gain cooperation across the organization to support sales and customer management improvement efforts*

## INVESTMENT AREAS

Starting in January of 2018 and over the next several product releases, our focus will be on developing **modules** and seamless user **experiences** by utilizing an **Anytime, Anywhere, Any device** strategy. This will include continued development of the Tour de Force Cloud Environment – a hosted option for customers that are looking for a cost-effective alternative to having a solution in-house and investing in infrastructure. Tour de Force plans to improve features and usability of several modules and create new modules.

## 2017 R2 - Release

### Strategic Pricing Associates (SPA)

In 2017 Tour de Force made a heavy investment into the Quote Manager user interface. Part of this investment was to build out integration to Strategic Pricing Associates (SPA). This is a third-party integration that will further the reach of the Tour de Force Quote Manager.

With the integration to SPA, users of Tour de Force will be able to load the Quote Manager and launch the SPA interface within Tour de Force. This will allow users to check pricing information using the SPA price bands and provide the best price to the customer. Below is a screen shot of the integration. This will be a web only integration to Tour de Force.

The screenshot displays the Tour de Force web interface. At the top is a navigation bar with icons for Home, Search, Recent, Favorites, Info Centre, BI, Utilities, Create, Admin, and JssorR. The main content area is titled "PRICING INFORMATION" and is divided into two main sections. The left section, "PRICING INFORMATION", contains a list of details: List Price (\$118.00), Product Name (Model T Mug), UOM (CS), SKU (1111 - THIS IS A SKU DESCRIPTION), Customer Name (55 - North Park University), Vendor/Manufacturer (Hot Wheels), Vendor ID (HW226), Product Family (390 - CUPS AND DISPENSERS), Customer Segment (Education-Higher Ed. Medium), QTY on Hand (100), Customer Haggle Index (95%), Core Status (Core B), Price Environment Score (Low), and Visibility (Low). The right section, "SPA PRICE BANDS", shows the Last Price Paid (\$100.17) and Last Transaction Date (Jan 19 2015). Below this are three price bands: a red band for \$97.98 (19.5% B/E Volume, \$3.43 Commission Bands), a yellow band for \$102.11 (8.9% B/E Volume, \$5.11 Commission Bands), and a green band for \$106.24 (0% B/E Volume, \$6.37 Commission Bands). At the bottom of the SPA PRICE BANDS section, there is a "Manual Price" and "Target GM%" input field with a "SAVE" and "EXIT" button.

### Time Tracking – Web

Time Tracking is a new feature that will be added to the Tour de Force Web Interface. This will allow users to track time throughout the day and associate that time back to the appropriate item (Activity, Task, Ticket, or Support Request) within Tour de Force. The Time Tracking feature will also be tied into BYOR and Alerts and Notifications for reporting purposes.

### Support Notes - Web

One of the controls that users can define on a screen in Tour de Force is the Support Notes control. This control allows users to add notes to an item like the Support Record and then perform several related actions. The notes control was only available in Tour de Force 2016 Desktop. In 2017, we plan to port this control over to the Web interface.

### BI Drill-In - Web

In 2017, we created a new feature in the BI Summary which allows users to Drill-In to the Sales data. From the BI Summary, a user is able to go into the Sales Summary and click on the numbers that make up 2 Years Prior, for example, and see what constitutes that number. Once the hyperlinked value is clicked, it opens another screen to the Tour de Force Drill-In data. This feature will be ported over to the web interface to give users the same functionality as the desktop interface in Tour de Force.

### BYOR Drill-In – Web / Desktop

In Build Your Own Reports, users have the ability to create charts using data from the Tour de Force. Currently a user is able to hover over the chart to see a tool tip of what makes up that data. The BYOR Drill-In would allow the user to click on a section in the chart and drill into what makes up that data. This feature would work the same as our BI Drill-Ins.

## 2018 – And Beyond

### Outlook Toolbar Desktop (Web Interface)

Tour de Force recognizes that the Outlook toolbar integration is a cornerstone of the software. In 2016, a new web toolbar was introduced that allows users to switch between Desktop and Web with the Outlook toolbar. Our focus in 2018 will be to add the other features of the Desktop Toolbar to the Web Toolbar which are listed below:

- Main Toolbar Interface
  - Activity Wizard
  - Draft Editor
  - Mailer
- Appointment Toolbar Interface
  - Draft Editor
  - Refresh Drafts
  - Personal Drafts
  - Global Drafts
- Task Toolbar Interface
  - Draft Editor
  - Refresh Drafts
  - Personal Drafts
  - Global Drafts
- Email Toolbar Interface
  - Draft Editor
  - Refresh Drafts
  - Personal Drafts
  - Global Drafts

### Outlook Toolbar Desktop (Web Interface)

Along with the completion of the *Outlook* Web Toolbar, Tour de Force will also be introducing an install package specific to *Apple* computers running *Microsoft Office*. This new feature will only work with computers running *Apple* OS and *Microsoft Office* with *Outlook* installed. The toolbar will allow users to access the Tour de Force web interface only.

### Build Your Own Reports (BYOR) – Desktop / Web

Tour de Force will be in the process of re-designing the BYOR and BYOQ interface. Some of those changes include the ability to click through charts and graphs, as well as hyperlinks in the grid data to drill into the details, and will be added to the Desktop and Web interfaces.

### Template Management and Creation – Web

Tour de Force has a robust template feature that allows users to create *Microsoft Word*, and *Excel* Templates to be used throughout the product. Currently creating these templates is only available with the Desktop Client of Tour de Force. In 2018, we plan to port this feature over to Tour de Force Web. Users will then be able to create and manage templates through the web interface.

## 2018 – And Beyond Continued

### Workflow – Web / Desktop

In 2018 Workflows will be ported over to the Tour de Force Web interface. In 2017, this feature was only available through the Desktop interface. This will give Web the same Workflow functionality that Desktop currently has.

At the same time, several other new features will be added to Workflows through the Desktop and Web Interface within the Applications.

### Sales Goal Planning / Entry – Desktop / Web

Based on feedback provided to the Tour de Force Development Team, we are working to complete changes to the Sales Goal planning. We will be addressing several areas and adding multiple new feature requests based on client suggestions.

Sales Goal Planning will be getting a new User Interface for the Web, allowing the planning to take place in the Web interface as well as the Desktop Interface. Users will have access to the Planning Admin through the Tour de Force Web interface.

### Configurable Homepage Tiles– Web

To increase the flexibility of the Tour de Force Web home screen, we will be adding the ability for personalization. This feature will be developed based upon customer feedback and will include the ability to configure tiles using drag and drop functionality on the Tour de Force Web homepage including: Daily Summary, Welcome Screen, Visualizations, BYOR Reports, and Alerts & Notifications.

### Marketing Automation - Web

Tour de Force has continued to build multiple integration points to different Marketing systems like Hubspot, Constant Contact, Act-On, and Mailchimp. In 2016, these features could only be accessed through the Desktop interface within Tour de Force. In 2018, we plan to allow users the ability to load this data using the Tour de Force Web Interface.

### Event Management – Web

In 2018, we will be adding a new User Interface to Event Management that will launch to Tour de Force Web. This will allow users to have the same functionality between Desktop and Web when using Event Management. During this time, focus will be on porting over existing functionality as well as new functionality to the Web interface. Users will be able to setup and maintain Events within Tour de Force using only the Web interface. Desktop will still have a launch point for Event Management that will load the Web form.

### Expense Management – Web

Adding expenses into Tour de Force is a feature that had some new additions in 2017, such as the ability to add images of receipts. A new User Interface will be added to Expense Management that allows users to enter expenses through the web interface. During this time, feature modifications and some new features will be added to make Expense Management more user friendly. Desktop will still have a launch point for Expense Management that will load the Web form.

### Survey Tracking – Web

Tour de Force will be introducing a New Feature for tracking Surveys. This will allow users to setup Surveys within Tour de Force that can be tied back to Records and Items within the application. The other piece of this new feature will be the ability for the user to integrate third-party survey tools back to Tour de Force. The first Survey Integration planned will be with Survey Monkey. This will allow users who use Survey Monkey to pull Survey Data back into Tour de Force.

## EXPERIENCES

At Tour de Force, we do not want to lose focus of our goal to deliver all features of the product Anytime, Anywhere, on Any device. The above product outline continues to keep this goal in mind. As new technologies are introduced in the market space, Tour de Force will continue to drive innovation to our customer base. Our plan is to deliver this around the different focus areas listed below.

### BROWSER EXPERIENCES

Tour de Force will support Internet Explorer, Microsoft Edge, Mozilla Firefox, Google Chrome, Opera, and Apple Safari browsers (Minimum versions will apply).

### USER EXPERIENCES

Through each release in 2018, users will see that Tour de Force will continue to update the User Interfaces to different areas across the product. With this in mind, our goal is to give users ease of use and navigation across any area of the product.

### PRODUCTIVITY EXPERIENCES

Tour de Force will continue to deliver a full integration into the customer's ERP system as well as the Microsoft Office product utilizing Outlook, Word, and Excel.

- A new connector will be developed for customers or prospects running QuickBooks Online and will be downloadable from the QuickBooks store.
- For users running Mac laptops or desktops and Microsoft Outlook, a Web Toolbar for Tour de Force will be introduced. This will give these users the same functionality that Windows users have with Outlook.

### DEVICE EXPERIENCES

Our device experiences are targeted towards a three-prong approach.

- *Any-time: Users will be able to access the data critical to the business life cycle Anytime, giving them the information they need.*
- *Any-where: Users will be able to access the data Anywhere they are, allowing anyone to stay connected with what's happening with a prospect or client.*
- *Any-device: Users will be able to get the same functionality across Any Device, allowing for a seamless transition from the field to the office.*

## PLATFORM

The Tour de Force solution has been designed on a platform that allows for scalability and flexibility at the click of a button or touch of the screen. We will continue to use leading edge technology to deliver our customers the best user experience across multiple platforms.

- Using today's best industry standards, we will continue to deliver a secure method for accessing your company's data across different platforms.
- *Performance and scalability:* We are continuously optimizing the solution for best performance with each release to deliver a scalable product.
- *Integration:* the ERP integration feature-set will continue to deliver robust integration to any ERP system.
- *Customization:* by keeping our system fully customizable, we allow customers to configure a majority of screens to display what is important to the business process at hand.

## Our Mission Statement

*The Mission of Tour de Force, Inc. is to provide our clients with competitive advantages through the continuous innovation of premier software solutions.*

*We accomplish this by publishing unrivaled software and providing unparalleled consulting services in an environment where our employees can meet their potential and thrive in an atmosphere of excellence.*

## Meet the Team

### EXECUTIVE TEAM

*Matt Hartman – President / CEO / CSO*

*Randy Merer – Chief Financial Officer*

*Laura Eier – Chief Administrations Officer*

*Jeremy Scheiderer – Vice President of Technical Operations*

 [Discover More Here](#)

### Team Trifecta

*Ann Fisher – Business Consultant*

*Daryl Fintel – Application Consultant*

*Joe VanCalster – Functional Support Team Lead*

*John Lammers – Director of Project Management*

*Kevin Phamakao – IT Manager*

*Micki Rausch – Application Consultant*

*Nathan Thomas – Business Process & Controls Analyst*

*Trent Thompson – Director of Sales Operations*

*Tricia Kirgis – BI / Integration Senior Consultant*

*Ross Metcalf – Senior Software Architect*

*Ryan Elliott – Senior Application Engineer*

*Jerry Waldman – Senior Environment Consultant*

*Dave Bell – Director of Customer Development*

*Jackie Bayer – Director of BI / Integration Services*

*Ken Ledyard – Director of Marketing and Demand Generation*

## CONCLUSION

At Tour de Force, Inc. we believe that our solution covers a wide range of CRM, BI, and BPO functions that no other company or solution can provide. Moving forward we will look to continually push the envelope and deliver a full featured product that delivers great value with a great experience for our clients. Tour de Force will provide a competitive advantage to help make organizations more Efficient and Effective.

We look forward to sharing the overwhelming excitement of all of our new offerings with our customers and partners! Keeping our followers informed of our future and direction is a priority for Tour de Force Inc. If you have specific ideas regarding a new feature request or product improvement, we welcome the feedback. Please reach out to us at [TDF\\_QA@TourdeForceInc.com](mailto:TDF_QA@TourdeForceInc.com) and share your feedback.