

FAQs – Install Base

1. What is Persuasion?

Persuasion is the newest release (v.5.0) of StreamServe's Enterprise Document Presentment (EDP) software. Built upon a new, Service Oriented Architecture (SOA), Persuasion delivers greater flexibility based on its modular, user-oriented design. This new architecture brings the power of Persuasion directly to business users, reducing the burden on IT support requirements for adds/deletes and changes to business documents. This wider organizational access greatly reduces the time to market for business communications by putting control into the hands of the subject matter experts in each department.

2. What is new about Persuasion?

Business: Puts the business user in control

User-friendly tools and a simple Web-based GUI helps business managers optimize customer communication across all touch points through the use of context-sensitive enterprise document presentment rules. Previously, edits required logging into a dedicated StreamServe server which lacked the intuitive, 'MS Office-like' design and editing tools of Persuasion. Additionally, access control for groups and individuals is both more granular and flexible for greater control.

Technical: Greater flexibility and integration

Multi-user environment enables workers to work on different parts of a project at the same time.

Integrated versioning control organizes and keeps track of all project files.

Controlled deployment landscape enables users to follow a controlled workflow for developing, testing and deploying projects through different phases such as transfer from development to QA to production.

SOA architecture provides support for key concepts for platform and database independence, protocol support (HTTP, SOAP, XML, WSDL, etc.), as well as support for combinations of protocols and messages.

Improved security ensures strict access control, data transport via secure channels, and the use of password/certificates to protect all steps in the document flow

3. What does Persuasion cost?

Persuasion upgrades are included in the annual maintenance fees. However, enhanced functionality that was not available in previous versions is not included and will be priced on an a la carte basis. Individual configuration and enhancement requirements will dictate Professional Services engagement cost.

4. Why should I migrate to Persuasion?

The primary technology benefits of Persuasion are realized through the transition to an SOA design, and the ease-of-use provided across the entire organization. Both changes increase flexibility, time-to-market and reduce TCO for greater contribution to a company's bottom line. In conjunction with these enterprise level application improvements, Persuasion greatly facilitates the expansion of StreamServe's capabilities to additional areas of an organization for a greater contribution to revenue growth. For example, Marketing can now make changes to personalized upsell messages at the very last minute to include time-sensitive, attractive data points such as interest rates, retail prices, etc, without the time and effort required to leverage IT to make those changes.

5. What business problems will Persuasion solve for my organization? What benefits should we expect?

Persuasion will reduce the reliance and requirement of engaging IT to make changes that are driven by other departments in an



organization. Now strategic business decisions can be made – and implemented – by the expert stakeholders in each department. Time-to-implement and the flexibility to test various offers, etc, are now controlled by the individual business owners, making an organization more nimble and able to respond to trends, acquisitions, etc, in timely manner for greater efficiency and growth.

Sample Business Problem

Irrelevant offers and wasted spending.

Account statements and invoices are frequently accompanied by glossy cross-sell and up-sell offers that don't apply to the recipient, (e.g. ninety year-olds receive information about a heavy metal rock concert, and recent college graduates receive information about orthopedic shoes).

Benefits

Dynamically search and manage archived customer documents to provide immediate and accurate responses to customer inquiries.

Improve up-selling and cross-selling opportunities by leveraging each customer call as a key touch point for providing personalized service and offers.

Deliver a pleasing, relevant and consistent customer experience based on knowledge of customer history and preferences.

Strengthen customer loyalty by collaborating with marketing, sales and service functions to provide rewarding customer experience through shared, accurate and accessible customer data.

Sample Business Problem

Right time, right place, right information?

In today's economy, people need to prioritize the amount of information they focus upon; how important, how relevant is the information, how soon do I want to take action? In some cases, I want information and I want it now!

Benefits



Improve customer interaction by customizing delivery of customer communication across multiple channels including print, web and mobile devices.

Deliver documents on demand to a customer's preferred channel.

Strengthen customer loyalty by respecting preferences of information delivery.

6. How difficult is it to implement?

StreamServe has a highly successful track record of upgrading our customers across all previous releases. There are two StreamServe utilities that will assist in assessing a migration roadmap; the migration tool and the testing tool. StreamServe provides both of these tools to aid in making the migration as smooth as possible. Again, each installation configuration will dictate the effort necessary to transition. However, in many cases customers have found that the new enhancements broaden the contribution StreamServe can have in the organization. While expanding the functionality may add additional time in some implementations, customers have found the long term benefits so compelling that this time-investment actually positively impacts the overall ROI of doing so.

7. If I am currently on previous version, what is required to adopt Persuasion? Do I need to migrate through multiple versions to get to Persuasion?

For customers on version 4.x there is a straight path to upgrade resulting in minimal impact on an organization's operations. Prior release versions require a slightly more complicated migration path as an upgrade to version 4 is required as part of the upgrade path to version 5.0. Although there may be a multiple-step upgrade requirement for some implementations, the result will take StreamServe from a one-dimensional application to a multi-faceted tool that can drive greater efficiencies and revenue from more departments and processes in an organization.

One consistent component of the migration process is that an approved external database is required to run Persuasion. If an organization is not already utilizing an external database, they will



need to implement a database to make the transition to Persuasion.

8. What external DBs does Persuasion support?

Persuasion supports SQL Server 2000 and above, and Oracle v.10.2. Additional DBs such as DB2 will be supported early 2007

StreamServe Persuasion repositories are stored as database tables in any of the following database management systems (DBMS). It is recommended that database tables are stored on a dedicated database server.

Databases

DBMS	Version	Comments
Microsoft SQL Server 2000		SP4 or later needed.
Microsoft SQL Server 2005		
Oracle	10.2	

9. What is the impact on performance (CPU and output)?

The impact on performance is highly dependent on the current version of StreamServe that is running, along with the variables of how an organization utilizes the application. StreamServe Professional Services will work with each customer's team to implement the upgrade in a manner that fits their requirements.

10. How long will previous versions be supported?

Today, StreamServe customers remain productive across multiple versions. Support for previous installations are version-specific. Customers on version 2.x are eligible for current version license upgrades at no cost if their maintenance is current. Customers on version 3.x are eligible for Web-based technical support through the end of 2007. Version 4.x customers are eligible for telephone and web technical support, and also retain no cost license upgrades as long as their maintenance is current. It should be noted that customers on previous versions cannot upgrade their StreamServe



functionality based on modules released in later versions without an additional investment for those new features.

11. What drove the development of the new version? The market, demands from customers, etc.?

The movement to Persuasion was market-driven; a combination of listening to our customer's needs, and a keen understanding of market trends. Based on these factors, StreamServe created a product that is more flexible, user-friendly and modular. We can now offer greater base-level functionality, along with vertical or situational-specific functionality for our customers. For example, compliance-archiving is extremely important for Financial Services, but many other customers may not have a requirement for that particular feature.

12. What are the technical requirements necessary to run Persuasion?

This is entirely dependent on how you use Persuasion. However, the minimum requirements are outlined in the table below.

Minimum Requirements

Item	Requirements
Operating system	Any of the supported operating systems
Processor	Dependant on operating system
Memory	1024 MB
Graphics	24-bit 1024x768 (XGA)
Hard Drive	500 MB

13. Who has tested the new version? What has been the reaction of the Beta/LA customers?

Beta and early release customers run the gamut in terms of size of the organization, vertical, and type of installation. These customers have been instrumental in the testing and development of the new functionality. The primary benefits expressed by early adopters include ease-of-use and expanded interaction and control



by multiple departments and stakeholders. Another beneficial impact has been gains in optimizing the design, development and deployment of their documents.

14. I have heard that there will be a change from a user-based price list to a transaction-based pricing model. What does this mean to me?

We have heard from many customers that they would prefer to budget their investment in terms of a predictable, quantifiable run rate. In addition, with the enhanced flexibility for providing users throughout the organization with the ability to access/contribute to the development of documents, the pricing can be more cost-effective while simultaneously providing greater ROI. While transaction pricing is attractive to many customers, StreamServe will continue to retain user-based pricing where requested.

15. I bought StreamServe on a per-user based price list. If I need to extend our use, how will that affect the price level?

You can continue to remain on the plan for which you originally contracted. However, we would suggest a review of the new pricing in light of expanding Persuasion access to users in other departments. Again, by expanding users, organizations will become more nimble and less reliant on the current seat license holders (typically IT). We believe that once customers have undertaken this exercise that they will realize the benefits of transactional pricing.

16. What does the packaging and pricing look like?

We have greatly streamlined the packaging and pricing which will now include transaction based pricing with volume bands, an Enterprise 'all-you-can-eat' license and partner pricing based on the partner's pricing requirements. In addition to the functionality that is included in each package, stand-alone modules (often designed for specific verticals) can be purchased separately. Please contact your StreamServe account representative to discuss the new packaging and its impact on your current pricing.

