



smart-view

# Smart-View

*Business Assurance.  
Business Intelligence.  
Document Management & Email Archiving*

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## Business assurance (BA)

*Business Assurance is the continuous monitoring of transactions as they cross business processes and applications ensuring accountability and ultimately reduce risk.*

*(MetaGroup, the need for Continuous Control Monitoring, June 2004)*

## Business Intelligence (BI)

*Customer Relationship Management is not new. Customer insight creates a unified conversation that spans marketing, sales and service and can be best achieved with the right business intelligence solution.*

*(Accenture, Unlocking Value through Customer Insight, 2004)*

## Document Management, email archiving for Exchange®

# Vision & Mission



## Vision

- Smart-View is as 100% partner of Ba-PRO BV, the preferred implementation partner for business assurance software for top companies world-wide
- Certified Partner of Panorama BI, Canada for Romania
- Certified Partner of H&S Soft Vienna, Austria

## Mission

- Smart-View provides hands-on consultancy, implementation, training and support for Ba-PRO with well-trained professionals for competitive prices.
- Smart-View implements business intelligence only on Microsoft platform with Panorama Novaview.

# Products & Services



- Turn-key Implementation projects for Ba-PRO and Panorama
  - Project management
  - Technical implementation
  - Business consultancy and implementation
  - Content creation
- Hands-on consultancy
- Training
- Support (24\*7\*365)
- High-end consultancy only as part of a full-scale implementation

# Key Differentiators



- **Customer focused**
  - Every client is treated unique with special care on on-going support and aftercare
  - On-going support 24 hours, 7 days, 365 days per year
- **Product focused (BA and BI) – all SAP Certified**
  - Ba-PRO
  - Panorama NovaView
  - exchange@PAM
- **Cover all industries and all back-office applications**
  - Smart-View provides consultants with back-office systems knowledge (SAP, Oracle, Microsoft, CODA)

# Why Business Assurance with Ba-PRO ?



- **Business Assurance** is the logical next step after Sarbanes-Oxley for automated, continuous monitoring of financial control.
- BA will give you a continuous monitor on transactions as they cross business processes and applications ensuring accountability and ultimately reduce risk.
- From Compliance to Assurance, the logical next step that will improve your business
- Risk management instead of Risk documentation
- XBRL based reporting made easy (e.g. Quarterly & Annual reports)
- On line, real time alerting and reporting to get a firm grip on your business
- Assure your business and thus your shareholder value
- Smart-View is the best partner for Ba-PRO implementations that covers all challenges from project start to on-going support

# Why Business Intelligence with Panorama ?



- Panorama BI gives you data analysis and reporting without the complexity and high costs of competitive products.
- Panorama **Business Intelligence** has lower TCO compared to the only competitor Cognos.
- Web-based online reporting features with KPI monitoring and dashboarding without the fuzz.
- No complex knowledge needed for either user or administrator
- Large multinational clients have chosen Panorama because of its performance, easy administration, easy use for end-users.
- Results within a few weeks, easy maintenance
- Panorama is strategic partner of Microsoft and follows development path of MS Server
- Smart-View is first partner in Romania and offers several License models available (e.g. leasing in a bundle with hardware).

# Why echange@PAM and DMS ?



- H&S Soft provides document management and archiving certified by SAP and is number 3 worldwide according to business analysts
- Email archiving and electronic stamps replace paper archives legally permitted with an EU Directive
- Growing reporting needs all over business process enlarge the old-fashioned paper archives tremendously
- H&S provides DMS to the government of Austria, City Hall of Vienna
- Track record of more than 15 years
- Email archiving becomes a must in today's business challenge for permanent evidence and organizational governance
- Document management, indexing and archiving is the base for Business Intelligence and Business Assurance

# Company - Management Team



- Founded in January 2004 in Romania as an IT integrator and representative for Panorama (first client in Romania), extended in 2005 to focus on Business Assurance implementations, training and support.
- **CEO:** Klaus Berghoffer
  - Austrian Nationality, 13 years international experience in FSI in 7 countries. Worked for IBM, Philips, Alcatel, ABN AMRO, Bank Austria in Hungary, Poland, The Netherlands, Germany, Austria
- **COO:** Marius Boboc

# Operational Structure - Team



- **Business Assurance (Ba-PRO)**
  - Financial Consultant (ex-EDP Auditor of Big4)
  - SAP consultant (for SAP ERPs)
  - Oracle DBA
  - Implementation specialist (Linux and Windows)
- **Business Intelligence (Panorama)**
  - Project Manager for BI implementations
  - BI specialist (MS SQL focused)
- **Customer Support**
  - Three Helpdesk officers
- **Marketing**
- **Office support**

# Clients & References



## Clients

- Alpha Bank Romania S.A. (2004 until present)
  - Business Intelligence reporting for all lines of business
  - Process Implementation and re-organization
- HVB Leasing, Cris Tim (Romania)
- ACCS (NL), Connexxion (NL)

## References & Pilots

- Banca Transilvania (FSI), Generali (FSI)
- Allianz Tiriatic (FSI), Raiffeisen Bank (FSI), ABN AMRO (FSI)
- Alexandrion (FMCG)
- Paynet (IT) – now Temenos

# Partners



- **Ba-PRO B.V.**

- Business Assurance software for the top and medium-sized companies on the U.S. and EU market



- **Panorama Ltd.**

- Leading Business Intelligence provider for MS SQL Server, Invented OLAP technology.



- **Royalty Jobs International S.R.L.**

- Personal Leasing Provider for temporary staffing with high expertise. Multi-national clients (Romania, EU).



- **Consulting implementation partners**

- Special knowledge in the CEER region

# Why Smart-View ?



- Partner of Ba-PRO and in close co-operation from Day 1.
- Only integrator that provides turn-key implementations and on-going product support
- Experience in several non-IT fields, such as accountancy, EDP audit and financial controlling
- Highly trained medium and senior staff (no juniors) at competitive prices
- Multilingual support staff (English, French, German)
- No administration overhead or high risk margins on top of the real implementation fees have to be born by the customer
- Management team has international experience and has been around in the industry for years

# Competition



- **Business Intelligence**

- **Panorama** is the only BI software that focuses on data analysis, KPI reporting and dashboards without the fuzz of scorecards, performance management etc.
- Only competitor with similar product is Cognos Powerplay.

- **Business Assurance**

- **Ba-PRO** is the only Ba vendor that combines Sarbanes-Oxley, time-frame based business assurance with non-invasive agent technology for source data gathering from any back-office ERP and financial (SEC filings and others) reporting based on XBRL repository.
- Competition is strong but limited to ACL and Approva that base their product on old batch technology, limited to SAP ERP

# Service Offer – BA



- **Project planning and –management**
- **Business process consultancy**
- **Implementation and consulting on**
  - Product installation and setup
  - Control documentation consultancy
  - Control documentation migration from other SOX products
  - Business Process definition
  - Ba-PRO agent configuration
  - XBRL Reporting
  - Back-Office system Assurance based on outcome of Business Rules (e.g. SAP authorizations)
- **On-going support & maintenance (on-site or call center)**
  - Detailed Service Level Agreement

# Service Offer – BI



- **Project planning and project management**
- **Data consolidation to the BI server**
- **Implementation, consulting, training:**
  - Reporting needs
  - Report generation
  - Access security
  - Portal development for web-access of all reports
  - Administration and report generation of the BI administrator
- **On-going support & maintenance (on-site or call center)**
  - Detailed Service Level Agreement
- **Outsourcing of report generation**
  - NDA pre-requisite

# Conclusion



- **Business Assurance** is the logical next step after Sarbanes-Oxley.
  - XBRL, used by Ba-PRO is already (2005) widely accepted and will become the reporting standard
  - Ba-PRO uses state-of-the-art, non-invasive agent technology for data gathering and is fully web-based.
- **Business Intelligence** is the light-weight data analysis in case you do not want to bother with complex performance management, (old-fashioned) scorecards or complex CRM systems. Panorama is 'the solution' in case you need only data analysis and enterprise reporting.
- **Smart-View**
  - maintains an extensive library of agents for several back-office systems (SAP, Oracle Apps, MS Navision, CODA, etc.)
  - Provides with pre-defined content and business processes per industry

# Appendix - Events



- Events participation
  - Petro Gas 2005
  - Chamber of Commerce 2006
  - Spotlight e-commerce in Travel 2006
  - Business Assurance Seminar 2006

## Planned

- Jeffrey Gitomer 2006 (November)

# Appendix - Prospects



- Prospects

- **Utilities:** Petrom, Petromservice, Transelectrica, Distrigaz Sud
- **Construction:** Rigips, Sommering Install, Iprolam, CCFNA
- **Pharma:** AD Pharma
- **Telco:** Orange, Romtelecom
- **FSI:** Banca Transilvania, Generali, Allianz, Omniasig, EOSRISQ
- **Automotive:** Porsche
- **FMCG:** British American Tobacco, Billa, Carrefour
- **Public:** Ministry of Finance, Chamber of Commerce

# Appendix - References



Below references are not a client list, but rather a list of clients that are also willing to testimony about successful collaboration with Smart-View

- **References – Romania**
  - **Alpha Bank**
  - **HVB Leasing**
  - **Cris Tim**
- **References – The Netherlands**
  - **Connexion , ACCS, 4iTrust**