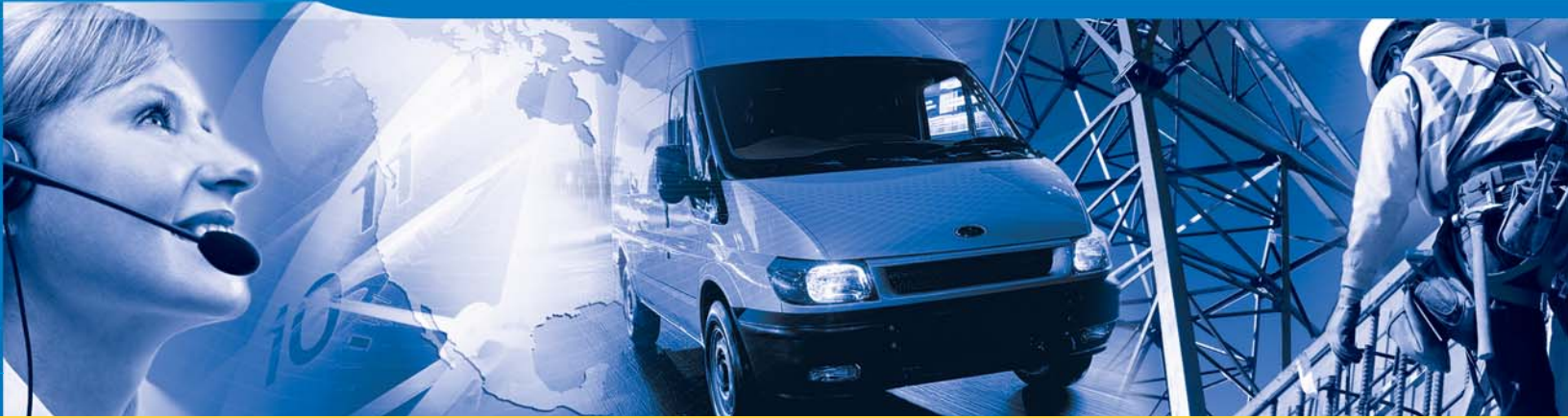


**ClickSoftware**  
Making Service Click

Corporate Overview



# Welcome to the Real-Time Service Enterprise

Every company has its own set of compelling strategic and tactical reasons to deliver high-quality, highly efficient service. While the circumstances may be unique, the basic challenges are the same:



Faced with these challenges, the question is no longer, “Why should I optimize my field service operation?” but instead, “How quickly can I get it done?” The good news is that it’s never been easier to implement an end-to-end service optimization solution that encompasses all facets of the operation – including every aspect of forecasting, planning, execution and analysis.



ClickSoftware is the leading global provider of mobile workforce management and service optimization solutions. For 15 years, we’ve provided these solutions to more companies than has any other technology provider. Our customers include a broad cross section of industries, including telecommunications, utilities, home appliances and office equipment, and range from multinational to local in size.

These companies use ClickSoftware to optimize reactive, unplanned work, such as emergencies and “break-fix” calls, as well as routine operations like preventative maintenance, meter reading, periodic inspection, construction, and infrastructure maintenance. The benefits include higher productivity in terms of jobs per day, increased compliance with service level commitments, lower operational costs (labor, travel, overtime, back office overheads), higher customer satisfaction, improved responsiveness to customers, and, ultimately, increased profitability.

## Decision Making in Service Delivery and Workforce Management

ClickSoftware enables intelligent decision making across all levels of the organization (unlike CRM, asset management and inventory management, all of which are primarily concerned with data processing). ClickSoftware eliminates guesswork and inefficiency in service delivery by providing the answers to fundamental questions, such as:

- **Demand Forecasting** – How much work is likely to arrive? When? Where? Which type?
- **Capacity Planning** – What should the size and the skill mix of the workforce be in each location and timeframe?
- **Tactical Resource Planning** – Who will be available (not on vacation or in training) to do the work when it arrives?

- **Rostering** – What is the ideal allocation of resources to shifts, to best meet the anticipated workload?
- **Scheduling** – How do we optimally allocate resources to work while considering everything about each resource, current commitments, travel and the individual needs of each customer while dynamically adjusting to inevitable business changes?
- **Execution** – How do we respond, in real-time, to dynamic developments during service delivery (traffic jams, job cancellations, emergency calls)?
- **Analysis** – How are we performing? Where are the bottlenecks? What can we do to improve?



# The Global Expert in Mobile Workforce Optimization

To ClickSoftware, optimization isn't just about automating workflows – it's about viewing service as a broader strategic weapon. Our goal is to enable a quantum leap in efficiency and effectiveness, one that leads to measurable improvements in key performance indicators.

## What makes ClickSoftware the right company and solution for your organization?

**Breadth and Depth:** ClickSoftware provides the broadest and deepest portfolio of solutions for mobile workforce management and optimization, enabling organizations to rely on a single partner for all their workforce management needs.

This comprehensive set of solutions covers the full spectrum of decision-support and optimization needs of a service organization, including shift scheduling (rostering), tactical resource planning (managing vacation requests, training, contractors), and long term capacity planning. Our forecasting solution produces customer demand forecasts for long term decision making as well as monthly, weekly and even daily forecasts. Additionally, we offer analytic and reporting tools for measuring numerous key performance indicators in areas of service quality, resource utilization and overall productivity.

**Proven Experience:** For 15 years, we've helped companies of all sizes, in a wide variety of industries, create a legacy of stellar service and streamlined, profitable operations. The result is the largest installed base of any service optimization solution provider including companies such as Anglian Water Services, Best Buy, Diebold, Ericsson, Telstra and Tomra.

**Technology Leadership:** ClickSoftware is the global business expert in workforce optimization - with one of the largest research and development organizations and budgets in the industry. We provide a powerful and innovative service-oriented architecture that ensures full availability, maximum agility and proven scalability.

**Service Sector Leadership:** No other solution provider has devoted the same amount of time, energy or resources to service management. ClickSoftware's specialization has resulted in recognized thought leadership; in 1996, we coined the term of "Service Chain Optimization." More recently, we were awarded a patent for our concept of continuous planning and scheduling, which is the fundamental principle behind service chain optimization.

**Commitment to Customers:** ClickSoftware prides itself on having a strong and active customer community. A portfolio of opportunities exists under the ClickConnect brand for our customers to meet and share best practices and experiences. Our Customer Advisory Board is a particularly valuable forum that ClickSoftware fosters to ensure that its solutions are positioned to satisfy clients' long-term needs. Some of our educational programs and services include:

- ClickSoftware University, an Executive MBA-like series of courses that focuses on proven methods and principles for improving field service operations
- Consulting services that help enhance the use of the optimization technologies provided by ClickSoftware applications and increase business awareness by sharing the domain experience captured through our many interactions with businesses around the world
- Implementation and advisory services that increase the effectiveness and decrease the risk of implementing ClickSoftware solutions
- Comprehensive training to equip and enable users, partners and administrators

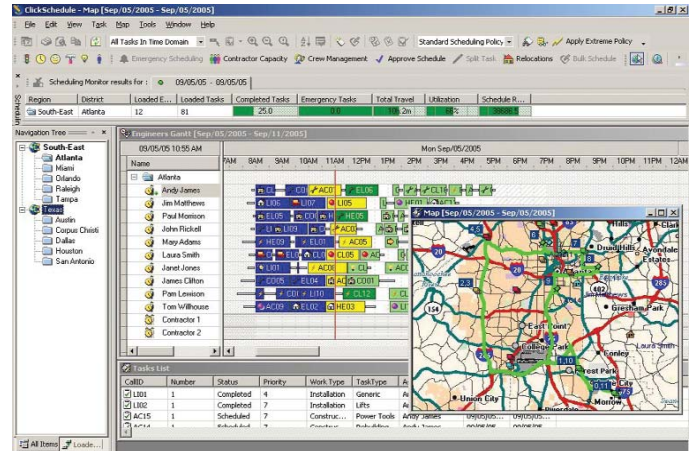
**Strong Partnerships:** ClickSoftware has spent years building partnerships with leading systems integrators and technology providers, including SAP, IBM, Accenture and Microsoft. Our global partner program allows our joint customers to benefit from our partnering efforts and ensures that the highest standards of quality and reliability are at the core of all joint customer engagements.



# What Is the Real-Time Service Enterprise?

One of ClickSoftware's unique differentiators is that our software and decision-making abilities are structured to respond in real time to any kind of event in the field in order to automatically produce better schedules. In this way, ClickSoftware enables the creation of the Real-Time Service Enterprise, with tools that allow proactive management of the forecasting and planning process as well as day-of-service delivery.

The Real-Time Service Enterprise encompasses the entire service chain, enabling the service organization to respond to any event that could impact service delivery. This can include events with long-term impact, such as changes in oil prices, new technology, changes in business goals and priorities, and changes in customer demand and habits.



## Real-time decision making based on data from the field

The capabilities also include management of immediate business concerns, such as promising a future delivery date and time window to a customer. ClickSchedule makes dynamic decisions for the actual delivery plan based on all other customer orders in the system, the best-known availability data for spare parts, special tools and workforce capacity. Because the date and time are based on true labor capacity, travel considerations and availability information, ClickSchedule ensures that whatever has been promised will be delivered – on time.

On the **day of service**, when assignments have been issued for all of the day's work orders, emergencies may arise, jobs may take longer or shorter than expected and traffic problems may cause unexpected delays. ClickSoftware continually and automatically considers the real time impacts and optimizes the work plan based on service level agreements, cost job priority and urgency, for all jobs; planned as well as reactive work.

The service delivery chain (plan, execute and analyze) is "live" at all times, and is updated at predefined intervals or in response to new information and events. The solution constantly "listens" to any event in the field, and is fully synchronized with delivery status of existing calls, technicians or spare parts availability. Utilizing all of this information, ClickSoftware maximizes throughput while complying with promised delivery dates and other business rules.



## Multiple device support: from simple cellphones to handheld devices and portable computers





# An End-to-End Approach to Service Optimization

ClickSoftware products are grouped into three categories: proactive management (planning) activities, daily execution activities and business intelligence.

## Proactive Management

Workforce management begins with both long- and short-term planning, responding to questions like, "How many resources will be needed? Where? When? With what skills? For how long?" ClickSoftware provides answers to these questions with the following products:

**CLICKFORECAST** – Creates a demand forecast based on demand for the next year/ month/ week, where, and by business line and skill.

**CLICKPLAN** – Balances the demand forecast with the available workforce in order to promise just enough resources in the right place, at the right time, with the right skills. Typically, ClickPlan supports decisions such as workforce recruiting, training programs, relocations, and planning overtime and subcontractor usage.

**CLICKROSTER** – Plans shifts in order to balance demand coverage, engineer preferences and cost. ClickRoster supports decisions such as who should work on what day/hours, as well as the right time for vacations and days off.

## Execution

Execution activities center around who will actually perform which job, when, where and for whom. ClickSoftware continually optimizes this process with the following products:

**WORK ORDER MANAGEMENT MODULE (WOMM)** – Manages the task lifecycle, from capturing the customer problem to task completion. The product verifies problem and contract details, suggests appointment times and tracks the execution process.

**CLICKSCHEDULE** – Defines who does what job, when, where and for whom. ClickSchedule automatically and immediately updates the schedule according to real-time feedback and updates from the field.

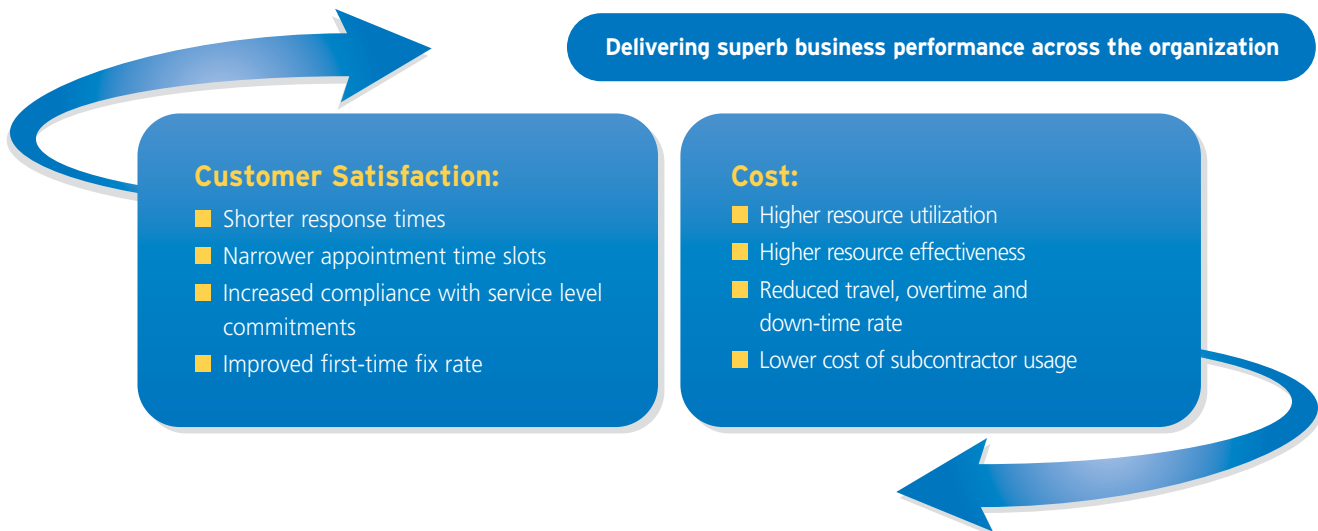
**CLICKMOBILE** – Automates engineer work in the field, including automatic dispatching, driving directions, real-time updates of job progress, billing, inventory tracking and back office updates.

**CLICKLOCATE** – Reflects the real-time location of field engineers and takes it into account when scheduling tasks.

## Business Intelligence

Analysis and performance tracking encompasses the final stage of the real-time service operation, and provides the historical basis for the demand forecasting link in the service chain. ClickSoftware offers the following business intelligence tool:

**THE CLICKANALYZE SUITE** – Enables both in-depth and executive level analysis through operational reports, performance monitors and analytical tools that identify problems and bottlenecks, identify the sources of problems, and suggest new directions.



## The ClickSoftware Advantage

When you implement a ClickSoftware service optimization solution, you take advantage of a number of exclusive technologies and capabilities. These include:

- Domain expertise, implementation methodologies and best practices incorporated into our products as a result of hundreds of client engagements
- Configurability for a variety of business objectives and workflows in different regions/countries or business lines. This allows easy implementation as well as easy adjustments to a dynamic business environment
- Proven scalability, with the largest number of proven successful deployments for service operations employing more than 1,000 field resources
- Ease of use – We provide a best-in-class user experience that makes the actual work more efficient. Our products incorporate valuable feedback that we have received from system users
- Easy integration to any outside system, along with ready-to-use adaptors for a number of ERP and CRM systems, as well as integration to middleware layers



Manage the lifecycle of the service call from creation through dynamic scheduling, mobile communication and real life reporting

### Solutions for Mid-Sized Businesses

For mid-sized organizations, service optimization solutions can seem frustratingly out of reach. This is typically due to price sensitivity, aversion to risk or simply the time and effort involved in piecing a solution together from various vendors. For these organizations, we offer ClickSoftware for Installation, Maintenance and Repair Services (ClickIMRS). This is a preconfigured field service management and optimization package tailored to the needs of mid-sized companies.

ClickIMRS includes a work order management module, optimized scheduling, mobility and operational reports. The solution leverages our extensive experience with small and medium-sized customers in the home appliance, computer and office equipment, industrial equipment and other industries. In addition, it requires minimal implementation effort, because it was designed and configured specifically to meet the needs of installation, maintenance and repair services.

Based on our industry-leading ServiceOptimization Suite, this solution:

- Can be rapidly deployed
- Provides world-class optimization and automation processes
- Incorporates industry best practices and business processes
- Performs in "stand-alone" mode but provides an architecture for ease of integration with other systems at a later date
- Allows the organization to change the service policy without the involvement of application providers
- Comes from a single vendor

ClickIMRS is based on best practices that have been gained throughout years of experience working with small to mid-sized businesses.

# About ClickSoftware

ClickSoftware (NasdaqCM:CKSW) is the leading provider of mobile workforce management and service optimization solutions that create business value for service operations through higher levels of productivity, customer satisfaction and cost effectiveness. Combining educational, implementation and support services with best practices and its industry-leading solutions, ClickSoftware drives service decision making across all levels of the organization. From proactive customer demand forecasting and capacity planning to real-time decision making, incorporating scheduling, mobility and location-based services, ClickSoftware helps service organizations get the most out of their resources.

With more than 100 customers across a variety of industries and geographies, and strong partnerships with leading platform and system integration partners, ClickSoftware is uniquely positioned to deliver superb business performance to any organization. The company is headquartered in Burlington, Mass. and Israel, with offices in Europe and Asia Pacific. For more information about ClickSoftware, please call **(781) 272-5903** or **(888) 438-3308**, or visit **[www.clicksoftware.com](http://www.clicksoftware.com)**

"ClickSchedule automates and simplifies the scheduling process so we ensure our field agents are as productive as possible, whether troubleshooting computer problems or delivering home theaters or appliances. ClickSchedule has the capacity to grow with us, playing an indispensable role in our long-term strategy."

**Bob Willett, Best Buy International**

"ClickSoftware aided the transition of our field-service model from functional teams to geographic teams, which in turn helped increase our volume of work-without increasing the size of our workforce."

**Alan Peacock, Vodafone UK**

"Field service is increasingly viewed as an integral part of a unified customer strategy, as integral as sales, marketing and customer support."

**Gartner, Inc., "Magic Quadrant for Field Service Management, 2007" by Michael Maoz and William Clark, May 11, 2007**

"We used to work in a reactive, trouble-based world. Now we are proactively planning, scheduling and managing exceptions."

**Dave Wilder, Bell Canada**

"Efficiency and productivity are critical to our continued plans for growth and profitability. ClickSoftware products will help us centralize workforce management while ensuring better productivity and reduced costs so that we increase customer satisfaction and revenues."

**Tomas Hansson, Reykjavik Energy**

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