

IBM FORUM 06

Results through Innovation



Welcome



**CONVERGENCE**

*"bringing people and technology together"*

what makes you \*  
special?



IBM FORUM 06

Results through Innovation



**CONVERGENCE**

*Mark Presnell, CEO*

what makes you \*  
**special?**

# Introducing: Convergence Limited

- Convergence is a privately owned company, founded in 1997
- Started as experts in software development and have expanded organically to offer a wide range of IT consulting services, primarily around IBM
- Founded operations based on Best Practice Methodologies applied appropriately and have a strong history of successful project delivery
- Premier IBM Business Partner (1 of only 3 in NZ)



# Convergence Customers

(partial list only...)

- New Zealand Police
- Toyota Financial Services
- Douglas Pharmaceuticals
- Australian Payments Clearing Association
- State Transit Authority of NSW
- Sky Network TV
- Global Science & Technologies
- Farmers Trading Company



## Why do we partner with IBM?

- IBM has been a leader in technology and innovation for over 50 years!
- IBM has the worlds largest IT research organization with about 3,000 scientists and engineers working in eight labs in six countries

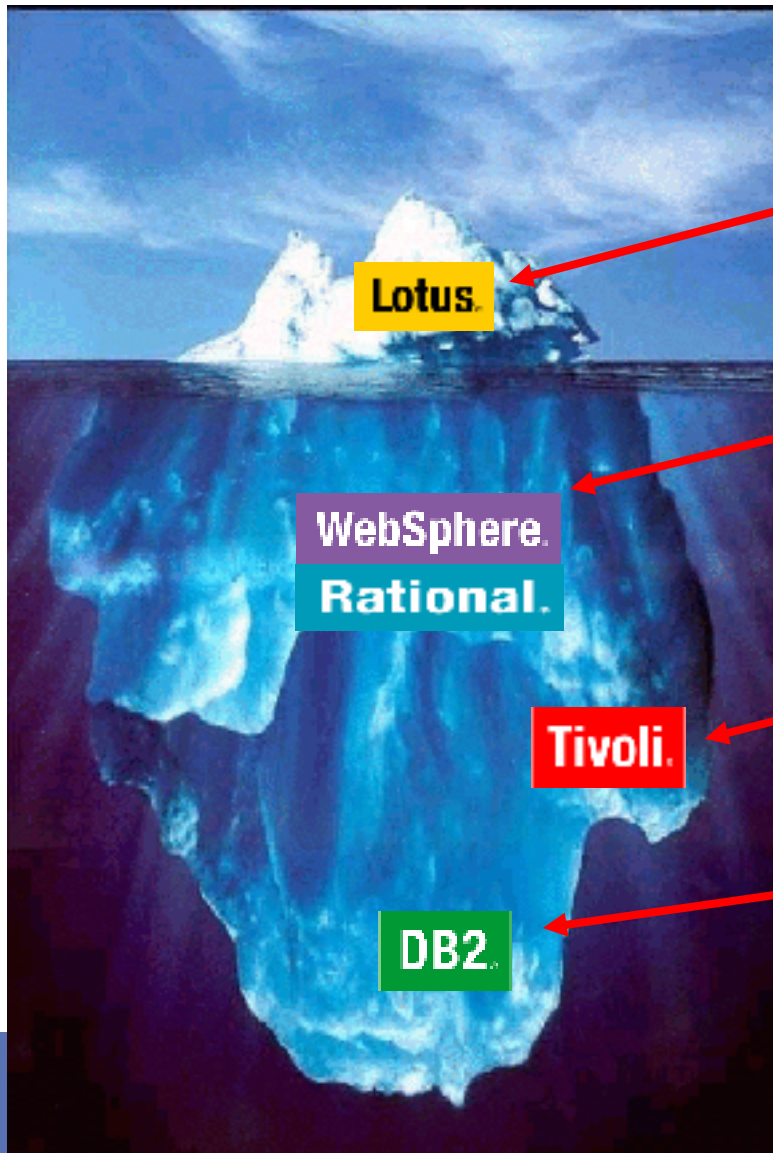


## Why do we partner with IBM?

- Over the last four years alone IBM inventors have received 13,000 patents. That's 5,400 more than any other patent winner and 8,000 more than their closest competitor.
- For the twelfth consecutive year IBM received the most US patents in 2004. IBM also donated 500 patents to the open source community
- This leads to... an un-paralleled vision!



# The Vision:



on the surface...

World leading portal, pervasive and collaboration delivery tools



under the bonnet...

Application delivery, middleware and integration tools for support of SOA principles



Comprehensive monitoring and management tools



underpinning it all...

Serious ILM and data management



# Symbiotic Relationship

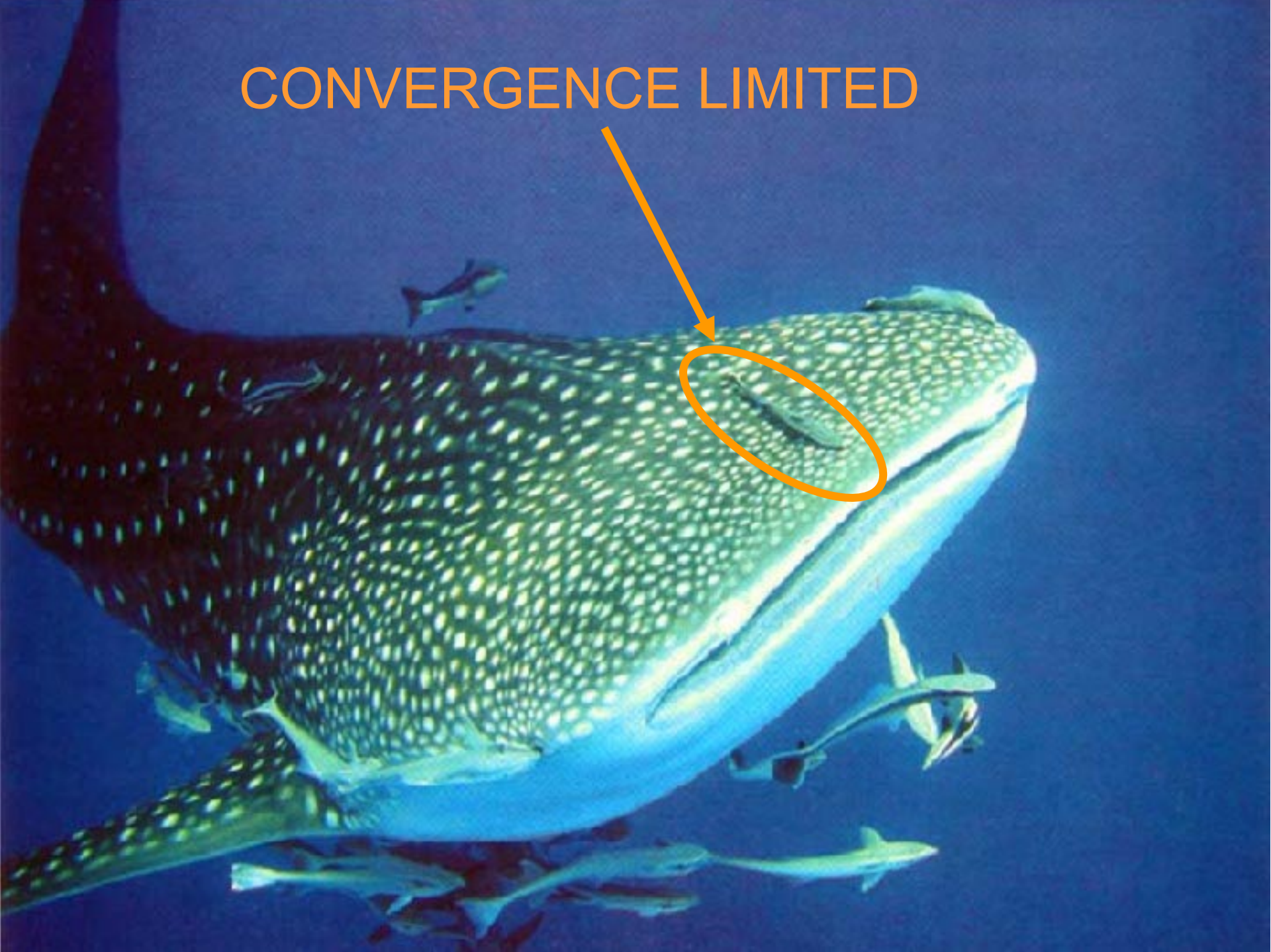
What Convergence brings to the party...

- Solution and innovation delivery tailored to New Zealand's local conditions
- Specialist skills maintained locally and tailored to local need: "Geographic Skills Caching"
- Continuity in relationships with clients

*"Convergence helps to make IBM solutions successful in the local environment, using local resources"*



CONVERGENCE LIMITED



# Collaboration

- The way organizations work together is changing.
- The world is a smaller place today and there is now unprecedented global access to exceptional talent in business partners, customers and independent experts.

A classic example of modern collaboration through technology: The regional DHB's recent use of overseas experts to read X-ray delivers 24/7 service to patients despite a shortage radiographers in New Zealand.



# Examples of Collaboration

- Email (asynchronous messaging)
- Instant Messaging (synchronous messaging)
- Intranets, Extranets, Discussion Forums
- Online Teamrooms & Virtual Classrooms
- Web Conferencing (voice and/or video)
- Combinations of the above...



# eLearning @ Toyota Financial Services

- Symbiotic relationship between Toyota and TFS
- TFS is motivated to keep car sales people abreast of complex financial solutions
- TFS has to be agile. Thus they need to be able to change and create new offerings to meet market conditions 'at the drop of a hat'...
- TFS has a commitment to helping the Toyota dealerships understand, sell and manage financial services for their customers.



# eLearning @ Toyota Financial Services

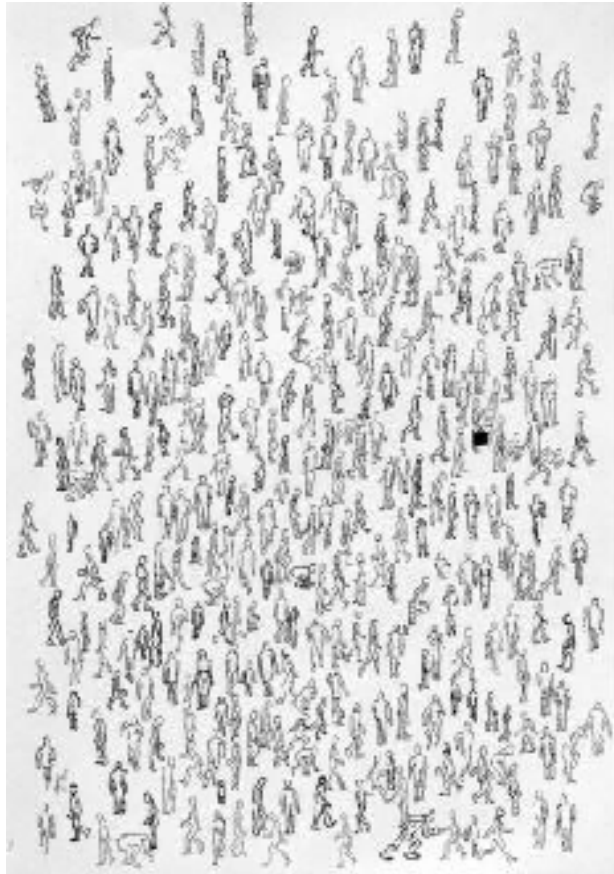


## Indicator # 1:

Large geographic separation  
of target population



# eLearning @ Toyota Financial Services



## Indicator # 2

As new sales people start at Toyota dealerships they need training.

This occurs randomly and training needs to happen on demand.



# eLearning @ Toyota Financial Services



## Indicator # 3

Existing sales staff need an up-to-date persistent resource they can reference as and when required.

Typically, this would default to a call center enquiry...



# Solution:

- An eLearning solution fully incorporated into TFS' self-serve Extranet...
- A web-based application based on Lotus Domino accessible any time from anywhere
- A system to deliver and monitor training
- Easy creation of training materials
- Online tests and certification



## Toyota Financial Services

Search

Toyota Internet | Toyota Finance Internet | Online Training

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- > Ad Subsidy Scheme
- > Bulletins
- > Interest Rates
- > Inside TFS
- >> Online Training**
- > Marketing
- > Help
- > Reports & Tools
- > My Company Details
- > My Personal Details

## Toyota Financial Services Extranet




Welcome to Toyota Financial Services' Extranet site which has been developed especially for dealership staff to help you sell and finance more vehicles. The site will be updated on a regular basis and you will have access to a range of information and services including:

- The latest product information and dealer bulletins from Toyota Financial Services
- On-line training facilities to assist you when selling Toyota Financial Services' products
- A range of interactive tools to help you select the best finance option for your customers

If you have any questions or feedback then please email [Christine Chieng](mailto:Christine.Chieng) or call Christine on 09 9773651.

## Hot Links

## Hot News

-  **Daihatsu 50/50 Campaign**
-  **Dealer Conference & Award Dinner**
-  **Business Managers' Campaign**

Toyota Financial Services - *Online Training*

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## Toyota Quality Financial Management

Welcome to the TQFM self study knowledge program. This is a series of modules designed to assist new and experienced Business Managers, and sales staff, become familiar with financial services concepts, sales skills and product knowledge. A TQFM qualification can be gained by completing a series of product knowledge tests and demonstrating sales skills ability, normally determined by consistently posting above average strike rates (usually a 3 month minimum). Sales staff with an in house Business Manager are encouraged to complete the product knowledge and will receive a stage 1 certificate.

Since the knowledge program was launched in March 2002, 17 Business Managers, 17 salespeople & 1 CEO are TQFM qualified and have gained entry to the TQFM Business Managers Club. TFS strongly recommend this program for all Business Managers and especially for sales staff who would like to progress to a Business Manager role, or who sell finance in their day to day role.

To access the modules or request a test select 'Courses', or 'FAQ's' to find out more about TQFM and how it can benefit

### Recent News

-  **What's Warwick Been Up T**
-  **September Update**
-  **BM Club Draw Winner!!**



## Toyota Financial Services - Online Training

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### Course Overviews

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Click on the course name to read the overview, access the training module or request a test. If you request a test it will not be available until it has been assigned by TFS. You will be sent an email to advise that your test is ready and you can access it from "My Assigned Tests".

#### Choices

[Credit Line](#)

[Operating Lease](#)

[Payment Protection Plan](#)

[Retail Financing](#)

[Toyota Vehicle Insurance](#)

[TQFM / Customer Centred Selling](#)

[Vantage Lease](#)

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## Operating Lease

<b>Course Name:</b>	Operating Lease
<b>Pre-requisites:</b>	None
<b>Purpose:</b>	An introduction to Operating Lease
<b>Goal:</b>	To understand & sell vehicle leasing
<b>How this Self Study Works:</b>	Download the training module, work through at your own pace, then request the test.
<b>Additional Information:</b>	Explains the TFS Operating Lease product

### Download



Operating Lease.pdf

[Download Acrobat Reader v5](#)[Request Test For This Course](#)[Feedback](#)

Internet

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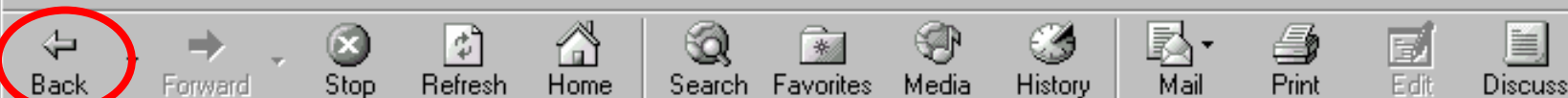
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# Operating Lease

## Training Module





Address http://www.tfsnet.co.nz/Applications/TrainingHome.nsf

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Done

Internet

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**Microsoft Internet Explorer** 

 Your request for a test for the Operating Lease course has been submitted.



Office  
  
Microsoft

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## Assigned Tests

---

Below is a list of your tests. Tests with a status 'Assigned' are ready for you to take and submit for grading.

Course Name	Test Number	Status	Date
▼ Choices			
	<a href="#">Choices</a>	Failed	08/02/2002
▼ Operating Lease			
	<a href="#">OPLease01</a>	Assigned	08/22/2002
▼ Retail Financing			
	<a href="#">Retail02</a>	Assigned	08/22/2002
▼ TQFM / Customer Centred Selling			
	<a href="#">TQFM/ CCS01</a>	Assigned	08/22/2002

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**Course Name** Operating Lease**Test Number** OPLease01

**Directions for Completion** This test is open book, so do not hesitate to use the module to help you with the correct answer. You must score 90% or better to receive a credit for this module. If you do not achieve 90%, review the module again and request another test. If you have any queries please contact the TFS National Dealer Trainer.

## Operating Lease Assessment

**Question No: 1** In an operating lease, the customer effectively ..... the vehicle over a period of time.

- a) buys
- b) borrows
- c) rents
- d) owns

**Your answer to question 1 ->**  a  b  c  d

**Question No: 2** How are the lower monthly payments achieved in leasing versus standard hire purchase?

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Your answer to  
question 13 ->

a  b  c  d

Question No: 14

**How is the GST component of an Operating Lease rental is paid and claimed:**

- a) In full on delivery of the vehicle
- b) The lessee can not claim the GST at all
- c) Monthly
- d) Only on termination of the lease contract

Your answer to  
question 14 ->

a  b  c  d

Question No: 15

**If the lessee is going to exceed their original contract kilometre allowance, what are the customers options?**

- a) TFS can do a variation to the lease and increase the contract kilometre allowance
- b) The lessee must buy the vehicle at the end of the lease contract
- c) The lessee can pay an excess kilometre charge at the end of the lease contract
- d) a and c

Your answer to  
question 15 ->

a  b  c  d

Submit




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**Microsoft Internet Explorer**



You scored: 33.33%.  
Sorry. You have failed your test. Please contact Linda Carpenter on 09 9773626.

**OK**



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- >> **FAQs**

## Frequently Asked Questions

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If you do not find an answer to your problem in the list of frequently asked questions below, please contact Linda Carpenter on 09 9773626.

- ▼ Choices
  - Can I reduce the final balloon payment?
- ▼ Credit Line
  - What vehicles are eligible for Credit Line?
- ▼ Full Maintenance Service Plans
  - What's included under Full Maintenance?
- ▼ GMTIV - Guaranteed Minimum Trade In Value Certificate
  - What finance contracts offer a GMTIV Cert?
  - What happens if the customer exceeds the kms?
  - What is a GMTIV certificate?
  - When can the customer use the GMTIV cert?

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**Payment Protection Plan****Can I sell PPP to customers over 60 years old?**▼ **Toyota Vehicle Insurance****Can I sell TVI to existing Toyota owners?**▼ **TQFM****What is Customer Centred Selling?****What is TQFM?**▼ **TQFM tests****Can I cheat in these tests?****Can I do the modules in any order?****Can I do the test without the module?**▼ **Vantage Lease****Can I do 60 months on a passenger vehicle?****Can I do a finance lease out of criteria?****Can I reduce the residual value?****Deposit or Advance Rental?****Why is there a separate invoice for the SSP, on road costs, etc?**

# The Facts...

- TFS is a one-stop-shop for automotive finance, incl. hire purchase, lease and insurance
- Selecting the correct financial solution can involve complex accounting and taxation issues



# The Facts...

- Customer satisfaction and sales are a direct result of staff being highly trained in product knowledge and sales techniques
- TFS set the standard with its TQFM (Toyota Quality Financial Management) qualification



# Critical Issue

- It was absolutely key to TFS to be able to not only deliver sales and product training to a large number of dealerships across the country but also monitor the effectiveness of the training provided.



# Significant Benefits include...

- efficient, targeted and monitored training available any time and anywhere
- Less time 'wasted' on basic topics, more time devoted to advanced topics
- improved product and sales knowledge
- lower number of help desk calls
- more motivated staff = reduced staff turnover



# Significant Benefits include...

- fewer and shorter visits by the national dealer trainer required
- greater number of certified staff
- higher customer satisfaction
- quicker time to market for new products (!)
- higher sales
- lower costs...



# So, what do TFS say?

*“Convergence demonstrated from an early stage that they understood our business requirements and the technology that was required. The system developed by Convergence surpassed our expectations on all key criteria. The system was delivered and went live within project deadlines and budget.*

*Most importantly the application developed was incredibly user friendly and intuitive to use. The uptake by Toyota dealers has been phenomenal and in a very short space of time we saw increased TFS product sales from dealers who had taken the courses.”*

**Linda Carpenter**  
**National Dealer Trainer, Toyota Financial Services**



The Outcome: Happy , Qualified Staff...



TFS staff receiving TQFM Certificates



# Critical Success Factors

- The TFS eLearning system had a senior sponsor
- TFS selected the right partner: Convergence
- Dealerships were given a number of benefits if they reached target certification numbers
- Help desk staff were instructed to refer callers back to the eLearning system: “Give a man a fish...”



# Lessons learnt...

- eLearning does not need to be complicated
- Focus on key objectives: training staff
- Involve key stakeholders
- KISS (at least to start with...)



# Why TFS selected Convergence

- We took the time to listen and learn about TFS' business
- We have a history of successful project delivery
- We are specialists, we stick to our knitting and we are good at what we do
- We partner where appropriate
- We have been an IBM business partner for over nine years



# Special IBM Forum 2006 Offer:

- FREE three hour consultancy to discuss, define, discover your special requirements
- FREE one month trial access to eLearning system with courses on:
  - eLearning
  - Email Archiving
  - MS-Office applications



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- Contact us to discuss any requirements you may have:

Free Phone: 0800-CONVERGENCE

Web: [www.convergence.co.nz](http://www.convergence.co.nz)

Email: [info@convergence.co.nz](mailto:info@convergence.co.nz)

