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Stakeholder Relationship and Issue Management Software - Powered by LookOut Software Inc.

LookOut Software's Stakeholder Relationship Management (SRM) software has the design, structure and capacity to offer issue management support for multi relational and multi dimensional projects.

SRM Software is developed on Microsoft's .NET technology, operates from a powerful SQL database engine and is accessible using Internet Explorer's browser interface.

Stakeholder and Issue management requirements throughout the consultation process are provided for within pre-constructed modules that interconnect in flexible and automated ways to ensure that whether you have to facilitate internal or external stakeholder projects the system will adapt to your needs.

Modules

1. Projects
2. Issues Management
3. Event Management
4. Individual Stakeholders
5. Organization Stakeholders
6. My Activity Centre
7. All Activities

Features

1. Stakeholder Notes
2. Document Connectivity
3. MS Outlook Plugin
4. Quick and Advanced Search
5. Grid Management
6. Excel Export
7. HTML Reports

Administration

a. User Manager
b. Group Manager
c. Field Manager
d. Import
e. Classification Field Control

These modules and features interact in a seamless way that is flexible, user-oriented, familiar, easy to learn and use. The SRM System can also be tailored and enhanced to fit unique needs should this be required.

1. Projects –Once a project is created and a user team assigned, the project will automatically collect all stakeholder details that relate to it, whether through Issue or Event Management. Project summary reports included.
2. Individual and Organizational Stakeholders–Stakeholder records can be related, depending upon the requirements of your project and/or consultation requirements. Stakeholder records automatically collect details relating to their involvement in projects, issues, events or mailing communications. Email communication via Outlook can be attached to the record for later retrieval as well as any type of files which are uploaded and connected to stakeholders.
3. Issues Management–Once an issue is raised by a Stakeholder, the Issue Management's built-in workflow will ensure that all details of the consultation process are followed.

   Workflow within the Issue Management form allows for:

   - Tracking all details pertaining to the reported issue.
   - Including other parties that may be impacted by the specific issue being raised.
   - Storing all activities taking place by internal team to manage the consultation process.
   - Tracking commitment date and details.
   - Tracking resolution date and details.
   - Finalization/Signoff email communication via Outlook to stakeholder.
4. Event Manager–Provides a formalized structure to manage events such as Open Houses, Workshops or Seminars wherein Stakeholders attend. Stakeholders that attend Events are automatically traced through the Event Manager as well as the Issue Consultation process and their own record store.
5. My Activity Centre – Contains all tasks and activities that system users are engaged in surrounding the Consultation Issue Management process, either created by them or assigned to them by another Internal Team Member.
6. All Activities – Contains all tasks and activities that are related to any Consultation Issue within the active system. Available for viewing by those with rights and privileges to do so.
7. Stakeholder Notes– Within the Note section you can create a history of general comments as they relate to Stakeholders throughout the relationship they have within a Project, an Event or a Consultation Issue process.

8. Document Linking – Store documents safely on your server and have them connected to an Individual or Organizational Stakeholder for easy access to Team Users. Can attach any type of file your computer can access.
9. MS Outlook Plugin – Team Users can install the Outlook Plugin (version restrictions apply) and connect email to the SRM system seamlessly. Create New records from Outlook and save emails to Issues and Events effortlessly. As well emails can be sent and received using Outlook and saving to the appropriate record in the SRM system.
10. Administration – The administration module is where Team Users are set up, security and privileges are applied and fields are changed. Through this module you may also control module and field access to users or to groups.

Projects

The Project Management module contains information that is relevant to the specifics of the project such as the type of project, who the Leader of the project is and when the project is completed.

Specification Details

1. The Project form system is designed as a “container” which automatically (without user intervention) connects records that are in any way related to the Project, such as Stakeholders, where a Team User has launched an Issue process or attached them to an Event they attended.
2. Team Users involved in the Project are selected from the User list. Additionally, Project Team Members who are not users of the SRM may be added.
3. Team Users and Team Members names and addresses may be printed by within the Project module.
4. Once the Project details are completed and the Team Users and Team Members are set up the SRM system will take over the automatic logging of details.
5. You may review the Project at any time to access built in pre-constructed reports:
    a. Project Summary
    b. Project Issues

Stakeholders (Individuals and Organizations)

The SRM system allows for both Individual and Organizational Stakeholders which can be related to one another or not as the requirement of your business dictates.

Specification Details

1. People are represented in the database as Individual Stakeholders and can remain as independent records or can be connected to one or more Organizational Stakeholder records.
2. The Current and Past Relationship module, along with the Relationship Attribute details interface provides the infrastructure to ensure that Stakeholder relationships can be described and appropriately managed.

3. Organization stakeholders are categorized by a two step Classification/Category system. These Classifications can be used for grouping, sorting, searching and analyzing data sets and are completely user-definable.

Issues Management

Issues are controlled through individual forms which have a built-in workflow to ensure that issues are appropriately managed by Team Members and their resolution and commitment status maintained.

Specification Details

1. Issue forms contain all details relevant to proper issue tracking of stakeholders and the process involved in managing their concerns to appropriate conclusion.
2. The Issue form tracks activities throughout the life cycle of the presented issue as it relates to Projects.
3. Resolution and outcome details must be updated in order to conclude an issue. Automatically stores the Team User who concludes these important milestones in the issue management process.
4. This module collects data that can be utilized for mitigation of risks.

Event Management

The Event Management module and subsidiary forms are designed to track formalized activities that your organization participates in, in order to reach groups of people that may be impacted by your Projects.

Specification Details

1. The creation of an Event form allows for detailing the Event's location and other relevant details, as well as attaching multiple Stakeholders.
2. You can use advanced search to find groups of Stakeholders and apply them in a batch to Events for historical logging or one at a time.
3. Attendance at an Event will automatically link the Event details to the Stakeholder record.

My Activity Centre

Each SRM Team User has their own Activity Centre which displays Scheduled Appointments in a Calendar View (by Day, by Week or by Month) and all activities (Task and Scheduled Appointments) created by themselves, or that others have assigned to them, is viewable in the Activity List.

Specification Details

1. Each Team User automatically receives their own Activity Centre when they are set up as a User in the Administration module.
2. The management of all Tasks and Scheduled Appointments (either related to an Issue, an Event or a Stakeholder) can be done directly from within the Activity Centre.

3. The Activity Centre can be viewed primarily as a calendar (in a daily, weekly or monthly view) or as a task list. This setting is User Definable and will default to the setting last selected.
4. From within the Activity Centre you may directly link to the related item, such as the Event, the Issue or the Stakeholder.

All Activities

The Main Activities Module displays all activities – both tasks and scheduled appointments – that are created throughout your Team Members irrespective of the Project, the Event or the Stakeholder that it is related to.

Specification Details

1. Access to the All Activities Main module screen is controlled by the Advanced Security module wherein only those Team Users you give permission to will be able to access these activities.
2. The All Activities Main module grid can be filtered down by Project, Event or Stakeholder in order to evaluate specific activity details.
3. When Activities are completed they will not show in the list by default but they can be displayed through the releasing of filtered completed items.

Quick Search and Advanced Search

LookOut's SRM system has many searching options to ensure that you may find any detail as it relates to any module within the system.

Each Management module has a built in Quick Search which provides the ability to search the database and retrieve a set of records based on a quick filtering system as shown below.

For more advanced requirements you can use the Advanced Search engine and create cross modular searches such as finding all Events for a specific Project or all Issues reported by Stakeholders within a specific classification.

Grid Management

Each LookOut SRM module has a primary grid system which is constructed to give you, the Team User, the most flexibility in locating data that is specific to your needs at the time. As well, the Grid can be adapted to display precise data which, when combined with a search result, will perform the function of ad hoc reporting which is then simply and instantly exportable to Excel or viewable in HTML format for flexible and "on the fly" analysis.

Specification Details

1. Each Team User has a default grid view setting, which is not impacted when another Team User adds or removes columns.
2. Several modules have built-in sub views which display further details related to that module for instant access to information. An example of this is in the Project module where you have access to related Issues and Events on screen.
3. Grid view columns are all sortable and allow for multiple select to support a variety of actions, such as letter merging, global notes and exporting.

Outlook Plugin for LookOut SRM

The Outlook Plugin operates within full version Outlook XP or newer. It installs and connects to the Web Service enabling Team Users to operate within Outlook without compromising the collection of key datasets that should be connected to Projects, Events, Issues or Stakeholders.

Specification Details

1. From within Outlook you may save emails to any record in the SRM system including Individual or Organization Stakeholder records, as well as any record that is related to these records, for example an Activity or an Issue.
2. You may also create new records from Outlook based on an email, for example an Activity for a specific Stakeholder. Once the record is created you may now save the Email to it for historical tracking purposes.
3. Team Users may utilize the power of the Outlook Plugin to manage incoming and outgoing email that relates to the Stakeholder and Issue Management process.
4. All email remains in the Email server and is only copied to the SRM system whereby it is now available for other Team Users.
5. Sign off by email to specific Issues could easily be saved to the related Issue to document the completion process.

Administration

The Administration module enables the SRM Manager to control rights by the Team users and their corresponding groups, as well as control access to modules and fields.

Specification Details

1. Options within the Administration module include the following:
    a. User Manager
    b. Groups
    c. Security
    d. Field Manager
    e. Import
    f. Classification Manager
2. The security features in the SRM are drilled down to the field level and can be as broad as a module. You may shut off access to one Team User or a Group of Users by preventing view access to the module. Alternatively, you may shut off access to view, edit or add to a specific field within a module.

3. The Field Manager is where new items can be added to the database, along with field name changes, which is all user-definable. We caution about changing data that may have historical purposes however.
4. The Import feature will enable the SRM Manager to import csv data lists to the Individual Stakeholder module.
5. The Classification Manager is where new classification and categories can be set up and/or modified so that enhanced searching is feasible at the Organizational Stakeholder level.

For more information or to arrange an online demo, please contact us in one of the following ways:

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