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# Needham Emerging Technology Conference

May 2018

# Safe Harbor Statement

This presentation includes “forward-looking statements,” which are subject to substantial risks, uncertainties and assumptions, subject to the safe harbor provisions of the Private Securities Litigation Reform Act of 1995. Accordingly, you should not place undue reliance on these forward-looking statements. Forward-looking statements include any statement that does not directly relate to any historical or current fact and often include words such as "believe," "expect," "anticipate," "intend," "plan," "estimate," "seek," "will," "may" or similar expressions. Actual results may differ materially from those indicated by such forward-looking statements as a result of various important factors, including: our financial performance and our ability to achieve, sustain or increase profitability or predict financial results; our ability to attract and retain customers; our ability to deliver high-quality customer service; lack of demand growth for Enterprise Work Management applications; our ability to effectively manage our growth; our ability to consummate and integrate acquisitions and mergers; maintaining our senior management and key personnel; our ability to maintain and expand our direct sales organization; our ability to obtain financing in the future on acceptable terms or at all; the performance of our resellers; our ability to adapt to changing market conditions and competition; our ability to successfully enter new markets and manage our international expansion; fluctuations in currency exchange rates; the operation and reliability of our third-party data centers and other service providers; and factors that could affect our business and financial results identified in Upland's filings with the Securities and Exchange Commission (the "SEC"), including Upland's most recent 10-K, filed with the SEC on March 9, 2018. Additional information will also be set forth in Upland's future quarterly reports on Form 10-Q, annual reports on Form 10-K and other filings that Upland makes with the SEC. The forward-looking statements herein represent Upland’s views as of the date of this presentation and these views could change. However, while Upland may elect to update these forward-looking statements at some point in the future, Upland specifically disclaims any obligation to do so. These forward-looking statements should not be relied upon as representing the views of Upland as of any date subsequent to the date of this presentation.


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# Upland Software at a Glance

## Enterprise Work Management Cloud Software

PROJECT & IT MANAGEMENT

WORKFLOW AUTOMATION

DIGITAL ENGAGEMENT

Nasdaq **UPLD**

**$138MM**[1] Revenue

**60%**[2] Revenue Growth

**35%**[3] Adj. EBITDA

**4,000+** Clients and Growing

**$18.6B**[4] Market Opportunity

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Started
**2012**

Headquarters
**Austin, TX**



*Acquisitive Growth Platform Company*

Acquisitions to Date
**17**

Source: Company information and management

(1) Based on the mid-point of our guidance range for the year ending December 31, 2018 as disclosed in the May 9, 2018 Form 8-K, plus Q1 gross pro forma revenue from the InterFAX acquisition.

(2) Year-over-year recurring revenue growth based on the mid-point of our guidance range for the quarter ending 6/30/2018 as disclosed in the May 9, 2018 Form 8-K.

(3) Adjusted EBITDA as a % of revenue based on the midpoints of the guidance ranges for the year ended December 31, 2018 as disclosed in the May 9, 2018 Form 8-K. See slide 26 for definition and reconciliation of Adjusted EBITDA.

(4) See slide 13.



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# 11 Reasons to Own UPLD

1. Acquisitive Growth Platform Company with large, accretive consolidation opportunity
2. Differentiated, scalable customer-focused operating model
3. High recurring revenue
4. High Adjusted EBITDA margins
5. Low capital intensity
6. Tax efficient vehicle
7. High Adjusted FCF conversion
8. Focus on per share value creation (Adjusted EBITDA, FCF)
9. Proven management team
10. Met/beat guidance in every quarter since IPO
11. Early innings, proven but with law of small numbers working for us


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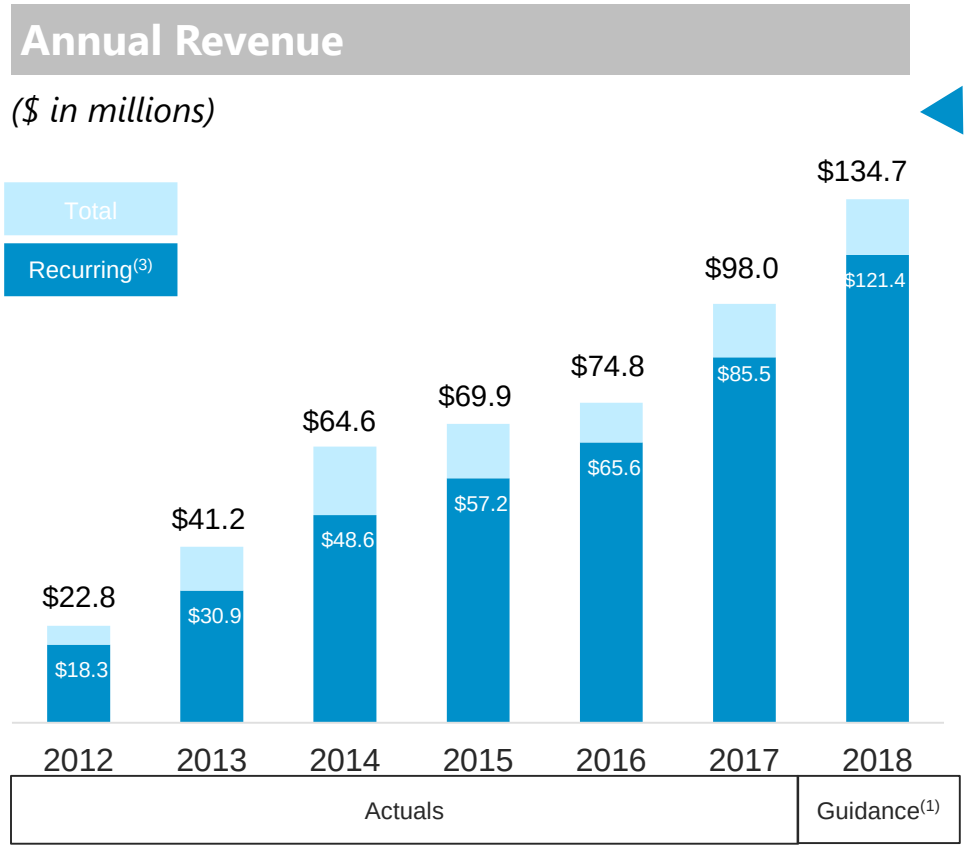
# Annual Revenue Growth Trend




$138 ProForma(4)

## 5 Growth Drivers

- 93%(2) Net Dollar Retention Rate
- Acquire cloud-based EWM applications and restructure them for improved profitability & sustainable growth
- Installed base expansion sales
- Cross-sell
- Efficient new logo acquisition

Source: Company information and management.

(1) Based on the midpoint of our guidance range for the year ended December 31, 2018 as disclosed in the May 9, 2018 Form 8-K.
(2) Based on key metric disclosed in the March 9, 2018 Form 10-K.
(3) Recurring revenue referred to in the table above is also known as Subscription and Support Revenue.
(4) Based on the mid-point of our guidance range for the year ending December 31, 2018 as disclosed in the May 9, 2018 Form 8-K, plus Q1 gross pro forma revenue from the InterFAX acquisition.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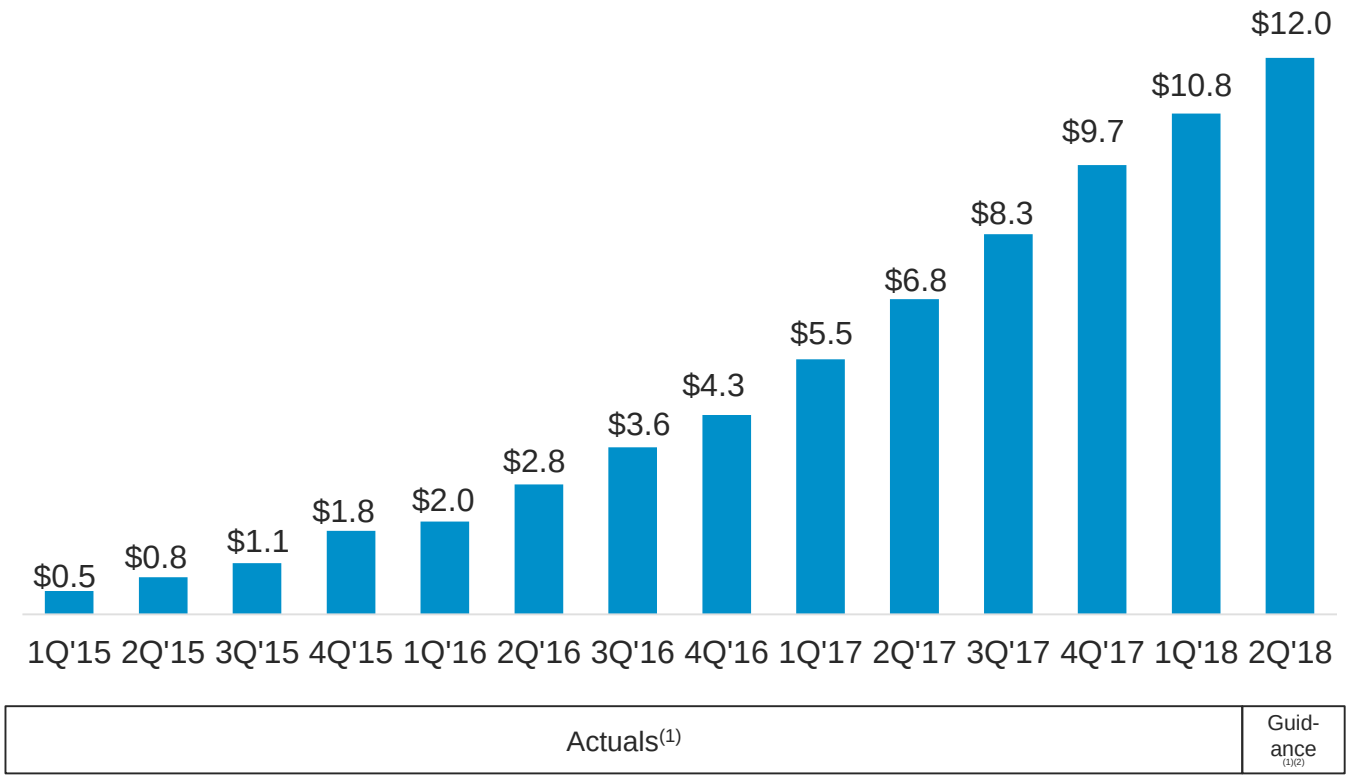
# Quarterly Adjusted EBITDA Trend

## Adjusted EBITDA

*($ in millions)*




## Robust, Consistent Margin Expansion

- Driven by UplandOne operating platform and scale efficiencies
- 40% Adjusted EBITDA(1) long term margin target

Source: Company information and management.

(1) Quarterly reported results (see slide 26 for definition and reconciliation of Adjusted EBITDA).
(2) Based on the mid-point of our guidance range for the quarter ending June 30, 2018 as disclosed in the May 9, 2018 Form 8-K.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# Recent Developments

## RECORD Q1

**53%** Q1 RR Growth
**34%** Q1 Adj. EBITDA(1)
**40%** Adj. EBITDA(1) long-term target

## ROBUST ACQUISITION CAPITAL

**$258MM** Credit facility

## PRODUCT INNOVATIONS

- **Upland knowledge-enabled PSA combined solution**
- **Upland Analytics initiative with ITFM solution**
- **Upland Workflow Automation solution interconnectivity**

## ACQUISITION

July 2017

Waterfall

## ACQUISITION

November 2017

Qvidian

## ACQUISITION

March 2018

InterFAX
Let the internet do your faxing

Source: Company information and management.

(1) See slide 26 for the definition and reconciliation of Adjusted EBITDA.

# Management Team



**Jack McDonald**

## Founder, Chairman and CEO

- Chairman and CEO Perficient, Inc. (NASDAQ: PRFT) (1999-2009)
  - Grew business from eight to 1200 employees, startup to $250 million in revenues
  - Completed seventeen acquisitions
  - Created $500+ million market cap on total net equity investment ~$10 million
- Led two prior successful software and technology deals
- Started career as M&A lawyer with Skadden Arps and exec. with Blockbuster Entertainment



**Tim Mattox**

## President and COO

- Executive at Dell, Inc. (1998-2013)
  - Ran worldwide product marketing for all desktops, notebooks, workstations, and associated software and peripherals, corporate and consumer (80% of Dell's revenue)
  - Led global operations for pricing, forecasting (demand/supply and financial), and product launch for enterprise products (servers, storage, networking accounting for 50% of Dell's profits)
  - Led corporate strategy for two years reporting directly to CEO/Chairman
  - Ran Americas marketing to companies >400 employees including global multi-nationals
  - Started, ran, and sold DellHost, Dell's web hosting service
- Held management roles at Bain & Company (1994-1998) and Oracle (1989-1992)
- MBA from Stanford and BS/MS degrees in electrical engineering and computer science from MIT



**Mike Hill**

## CFO

- CFO Perficient, Inc. (NASDAQ: PRFT) (2004-2007)
  - Grew revenues from $30 million to over $200 million run-rate in three years
  - Completed eight acquisitions
  - Led company from $70 million to $500 million in market cap
- Started career at Ernst & Young LLP
- BBA from the University of Texas, licensed CPA in Texas


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# We Provide Enterprise Work Management Cloud Solutions that Empower Teams

To compete knowledge workers need to act on information and collaborate with team members in real time — anytime, anywhere and from any device.




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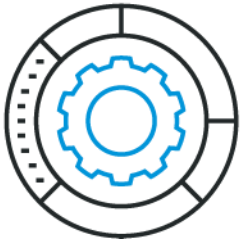
# Enterprise Work Management: Overview

*Award-winning cloud solutions that address specific business needs and deliver powerful results – not bloated suites or costly on-premise software.*



## Project and IT Management

*Manage your organization's projects, professional workforce, and IT costs.*



## Workflow Automation

*Optimize, automate and secure document intensive workflows across your enterprise and supply chain.*



## Digital Engagement

*Effectively engage with your customers, prospects and community via the web and mobile.*

*…and all our products are backed by Upland's 100% Customer Success Commitment*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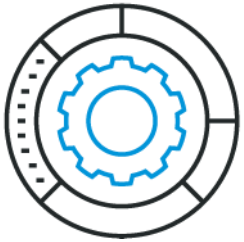
# Enterprise Work Management: Brands



## Project and IT Management

- Tenrox
- Eclipse PPM
- PowerSteering
- ComSci
- RightAnswers (IT Support)



## Workflow Automation

- FileBound
- AccuRoute
- Ultriva
- Qvidian
- InterFAX



## Digital Engagement

- Mobile Messaging
- Clickability
- LeadLander
- RightAnswers (Customer Service)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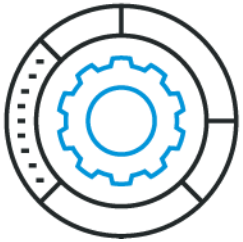
# Enterprise Work Management: Solutions



## Project and IT Management

- Lean Six Sigma/Process Excellence
- Project & Portfolio Management
- Professional Services Automation
- Risk Management
- IT Governance
- IT Cost Management
- New Product Development PPM
- Time & Expense Management
- Knowledge Management for IT Support



## Workflow Automation

- Enterprise Content Management
- Accounts Payable/Receivable Automation
- Human Resources Automation
- Healthcare Records Management
- Contract Process Automation
- Education Workflow Automation
- Government Document Management
- Electronic Kanban
- Collaborative Supply Portal
- Secure Document Process Automation
- RFP and Sales Proposal Automation



## Digital Engagement

- Application-to-Person Mobile Messaging
- Mobile & Text Marketing
- Web Content Management
- Website Visitor Analytics & Reporting
- Knowledge Management for Customer Service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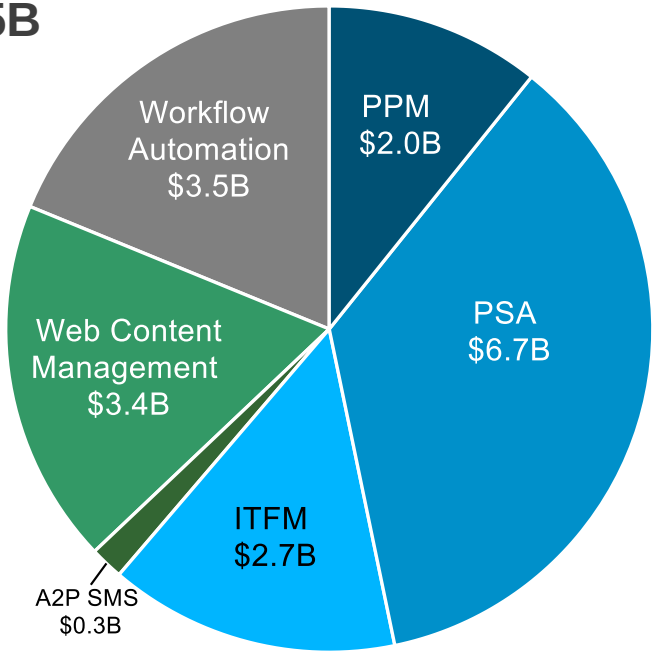
# Total Addressable Market $18.6B

**Workflow Automation $3.5B**




**Digital Engagement $3.7B**

**Project and IT Management $11.4B**


Sources:
*Magic Quadrant for Cloud-Based IT Project and Portfolio Management Services, Worldwide,* Gartner, 23 May 2016.
*Professional Service Automation (PSA) Software Market Size & Analysis By Application (Consulting Firms, Technological Companies, Marketing And Communication, Others), By Deployment (On-Premise, Cloud), By Region, And Segment Forecasts, 2014 – 2024,* Grand View Research, December 2016.
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http://wintergreenresearch.com/reports/Business%20Process%20Management.htm,



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# Our Customers

## FINANCIAL SERVICES




## GOVERNMENT, NON-PROFIT, EDUCATION



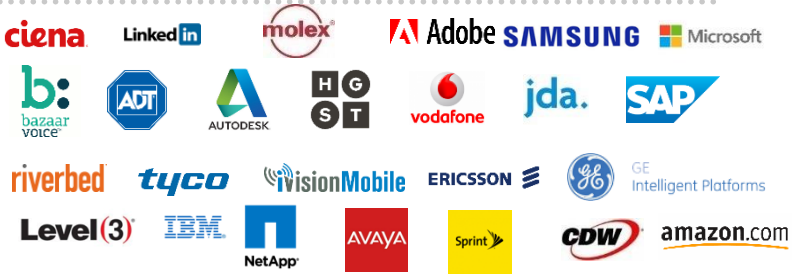

## MANUFACTURING, INDUSTRIAL




## CORPORATE SERVICES




## TECHNOLOGY




## HEALTHCARE




## MEDIA




## CONSUMER





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# Why Customers Choose Upland



## Award-Winning Cloud Products

You get the award-winning cloud solution that's purpose-built for your business need, not bloated suites or costly on-premise software. We make your best-of-breed strategy a reality.




## Customer Success Commitment

At Upland, customer success means you achieve the value you expect from our software and are delighted by the experience. Our entire UplandOne business platform is built around it.



## The Scale & Resources to Deliver

Upland is a financially strong, growing, publicly-traded company (symbol UPLD on the NASDAQ Global Market) with the scale and resources needed to invest in your success.


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# uplandOne

## One Unified Operating Platform sets the foundation for customer success

uplandOne

High-Touch Customer Success Program

Expert Professional Services

Quality-Focused R&D

24x7 Global Support

Customer-Driven Innovation

Enterprise Cloud Platform



**100% Customer Success**

| | |
|---|---|
| Loyalty | EBITDA ↑ |
| Renewal | Expansion |
| Cross-Sell | Referral |

**IMPACT**



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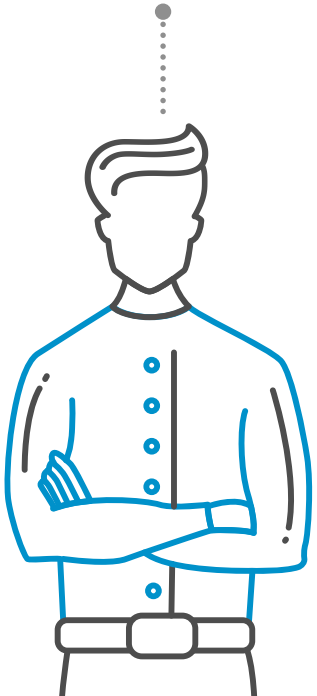
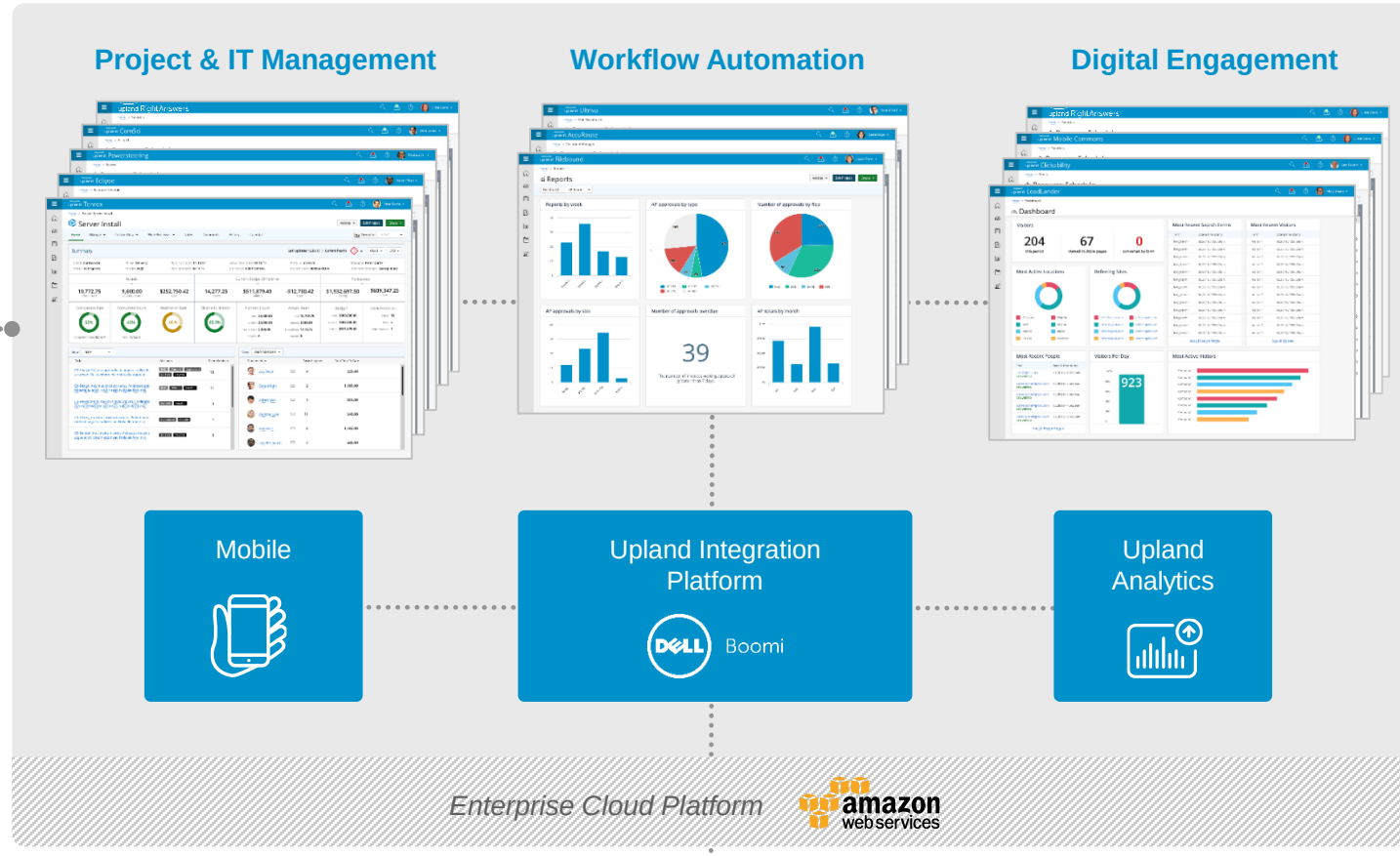
# Upland Product Experience Architecture



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# Sales and Marketing

High-touch low-cost demand engine targets installed base. Customer Success teams focus on renewals, expansion, Premier Success Plans, cross-sell, and NPS improvements.

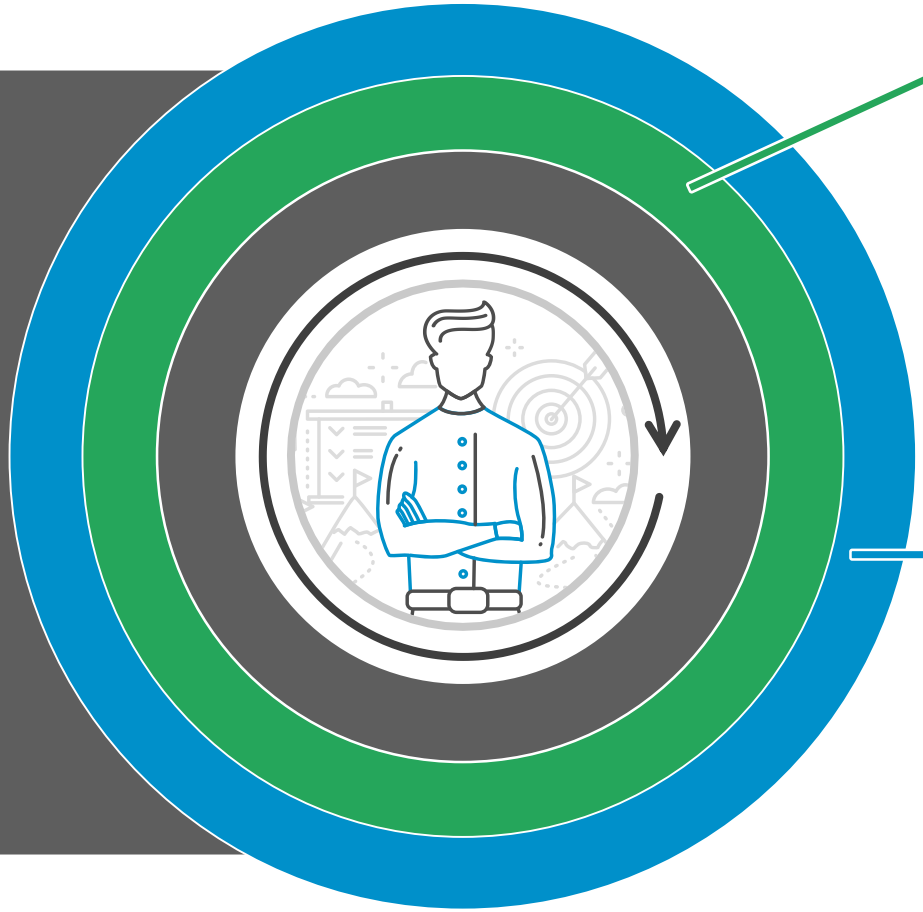
**CUSTOMERS**

**4,000+ Customers**

**450,000+ Users**

**100% NDRR Target**

**Strong NPS**



**ADVOCATES**

**Customer Success**

- Executive Outreach
- Customer Success
- Renewals
- Marketing

**PROSPECTS**

**Demand Engine**

- Field/Inside Sales
- Solutions Consultants
- Account Development
- Marketing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# M&A Strategy

We are building on our market leadership by acquiring built-for-purpose products that extend our depth, breadth and scale.

+ Add $25MM+ revenues per year through accretive acquisitions that build out our 3 product families

+ 17 acquisitions to date

+ 4 accretive acquisitions in 2017 and 1 in 2018 so far

+ Proven team has done 39 successful tech acquisitions in 15 years

+ Within 90 days, acquired products brought into UplandOne model

**What We Look For**



*Financial Profile*
Revenues in the $5-$25 Million Range



*Recurring Revenue Base*
Renewal Rates > 90%



*Enterprise Applications*
Built-for-purpose Enterprise Work Management



*Geography*
U.S., Canada, and E.U.


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PROJECT & IT MANAGEMENT

WORKFLOW AUTOMATION

DIGITAL ENGAGEMENT

Nasdaq **UPLD**

**$138MM**[1] Revenue

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**35%**[3] Adj. EBITDA

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**$18.6B**[4] Market Opportunity

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Started
**2012**

Headquarters
**Austin, TX**



*Acquisitive Growth Platform Company*

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(4) See slide 13.



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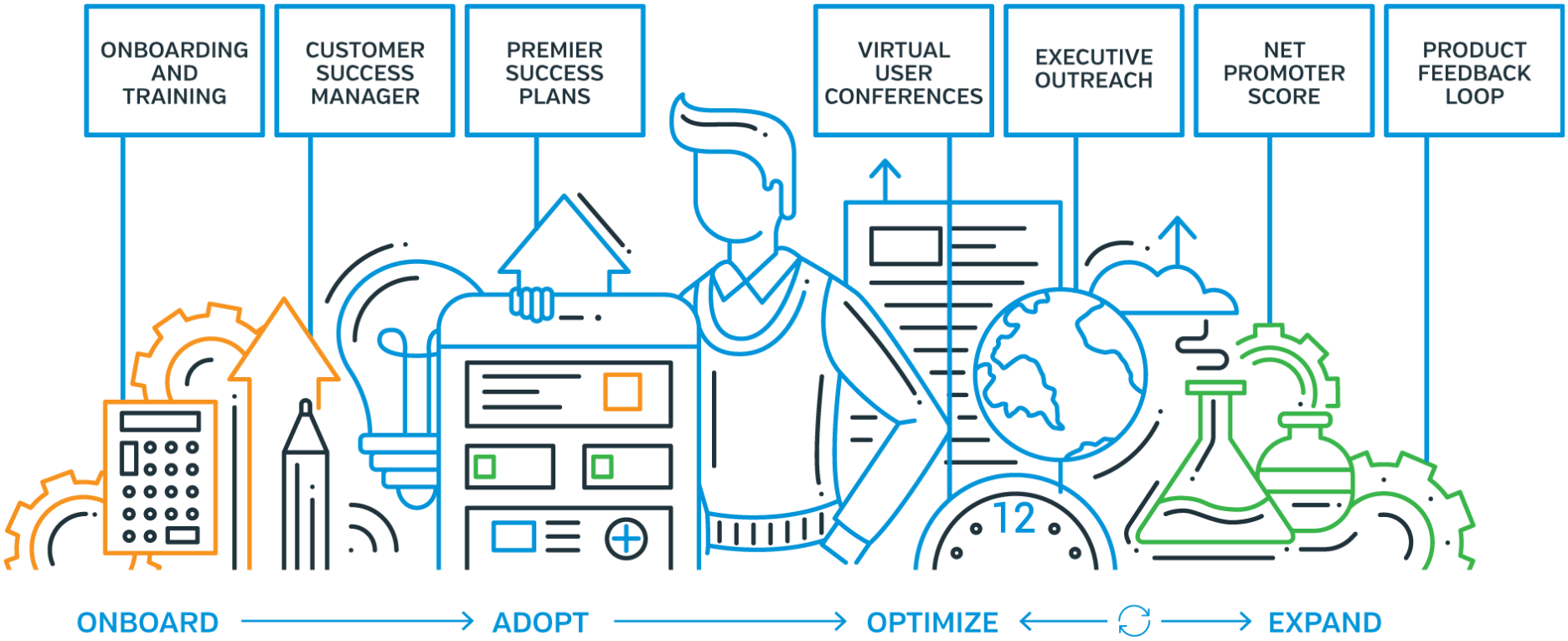
# Appendix

# 100% Customer Success Commitment





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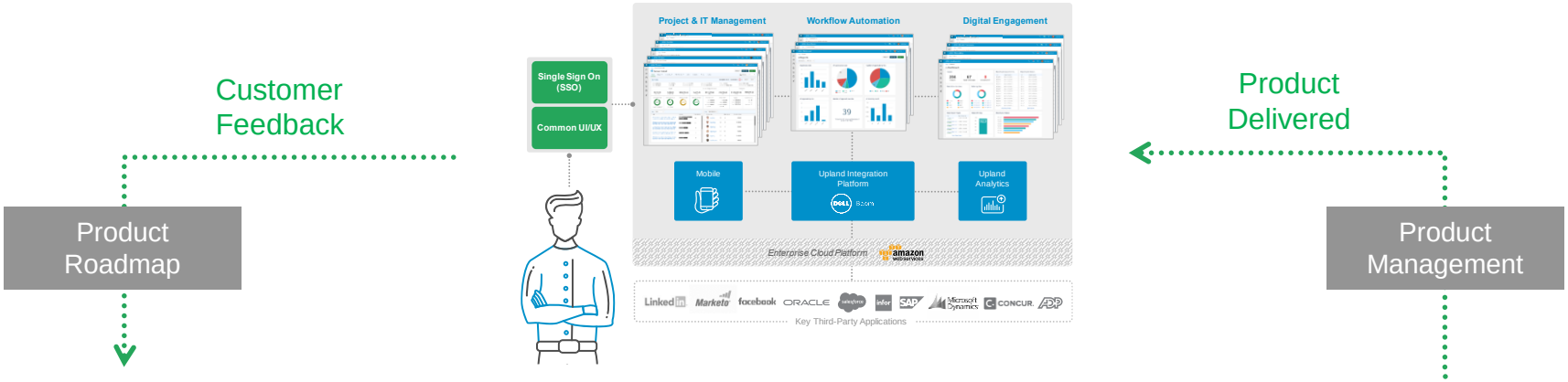
# Upland Development Platform

## Upland Product Experience Architecture




## Development Platform

| Knowledge Repository | Bug & Issue Tracking | Source Code Management | Code Quality Analysis (Every Code Submission) | Automated Unit Tests (Every Code Submission) | Automated Build | Automated Functional Testing | Automated QA Deployment | Automated Production Deployment |
|---|---|---|---|---|---|---|---|---|
| Confluence | JIRA | Atlassian Bitbucket | Code Insights | Code Firewall / DevRank | Jenkins | TestComplete | Jenkins | Jenkins |

DEV FACTORY

**Managed Service & Software by DevFactory allows for globally sourced developers and contractors**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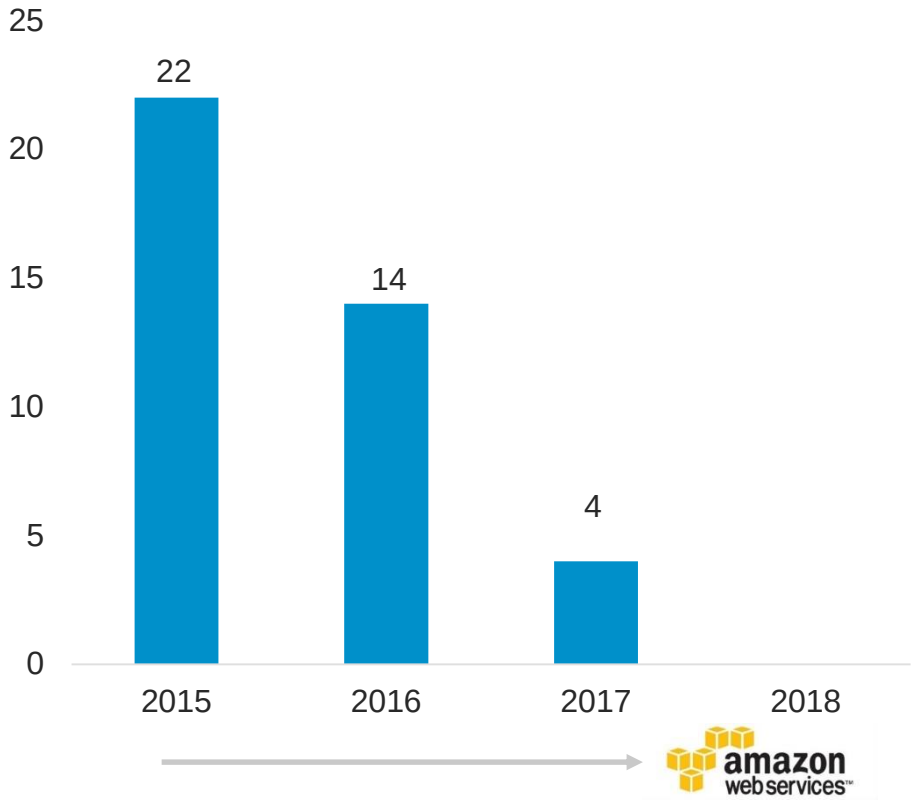
# Cloud Hosting Strategy




- All hosting to AWS by 2018
- Benefits include simplicity, security, compliance, geo-expansion, utilization variability and headroom, performance, market credibility
- Enables seamless and rapid onboarding of new acquisitions
- Saves $1MM+ per year in capex
- Applications to be containerized for portability and optimization

Note that the table above excludes the most recent acquisition and we generally migrate acquired businesses cloud ops to AWS within 2 quarters of closing an acquisition.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# Operating Targets (as a % of Revenue)

| | *Excludes Depreciation & Amortization and Stock-based compensation* | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | 3Q'16 | 4Q'16 | 1Q'17 | 2Q'17 | 3Q'17 | 4Q'17 | 1Q'18 | 2Q'18[3] | 2018[4] | Target Model |
| Revenue | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | **100%** |
| Non-GAAP Gross Margin[1] | 70% | 70% | 72% | 72% | 71% | 72% | 73% | | | **75%** |
| Research & Development | 19% | 15% | 16% | 16% | 14% | 14% | 15% | | | **13%** |
| Sales & Marketing | 16% | 15% | 15% | 17% | 16% | 13% | 14% | | | **12%** |
| General & Administrative | 19% | 18% | 18% | 15% | 14% | 14% | 15% | | | **10%** |
| Adjusted EBITDA[2] | 19% | 22% | 26% | 29% | 32% | 35% | 34% | 35% | 35% | **40%** |

Source: Company information.

(1) Non-GAAP Gross Margin is Gross Margin, calculated in accordance with GAAP, plus the impact of amortization of purchased intangible assets, depreciation expense, and stock-based compensation expenses.
(2) See slide 26 for definition and reconciliation of Adjusted EBITDA.
(3) Adjusted EBITDA as a % of revenue based on the mid-point of our guidance range for the quarter ending June 30, 2018 as disclosed in the May 9, 2018 Form 8-K.
(4) Adjusted EBITDA as a % of revenue based on the mid-point of our guidance range for the full year ending 2018 as disclosed in the May 9, 2018 Form 8-K.


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# Adjusted EBITDA Reconciliation to Net Loss

We define Adjusted EBITDA as net loss, calculated in accordance with GAAP, plus depreciation and amortization expense, interest expense, net, other expense (income), net, loss on debt extinguishment, provision for income taxes, stock-based compensation expense, acquisition-related expenses, and purchase accounting adjustments for deferred revenue. We believe that Adjusted EBITDA provides useful information to management, investors and others in understanding and evaluating our operating results; however, Adjusted EBITDA should not be considered as an alternative to net loss or any other measure of financial performance calculated and presented in accordance with GAAP and has important limitations as an analytical tool, including that other companies might calculate Adjusted EBITDA or similarly titled measures differently. Because of these limitations, you should consider Adjusted EBITDA together with other financial performance measures, including various cash flow metrics, net loss and our other GAAP results.

Below is a reconciliation of Adjusted EBITDA to net loss, the most directly comparable GAAP measure:

| | 1Q16 | 2Q16 | 3Q16 | 4Q16 | 1Q17 | 2Q17 | 3Q17 | 4Q17 | 1Q18 |
|---|---|---|---|---|---|---|---|---|---|
| Net loss | $(5.6) | $(3.6) | $(2.4) | $(2.0) | $(5.6) | $(5.8) | $(3.5) | $(3.8) | $(3.2) |
| Depreciation and amortization expense | 2.5 | 2.5 | 2.5 | 2.3 | 2.4 | 2.6 | 3.1 | 3.8 | 4.2 |
| Interest expense, net | 0.6 | 0.7 | 0.7 | 0.8 | 0.9 | 1.2 | 2.3 | 2.2 | 2.5 |
| Other expense (income), net | 0.8 | 0.3 | 0.1 | (0.4) | 0.1 | 0.0 | 0.1 | (0.5) | (0.3) |
| Loss on debt extinguishment | - | - | - | - | - | 1.6 | (1.6) | - | - |
| Provision for (benefit from) income taxes | 0.1 | 0.2 | 0.3 | 1.0 | 1.0 | 0.2 | 0.4 | (0.3) | 0.5 |
| Stock-based compensation expense | 0.7 | 0.9 | 1.1 | 1.7 | 2.3 | 3.6 | 1.9 | 2.2 | 2.6 |
| Acquisition-related expense | 2.4 | 1.4 | 1.0 | 0.7 | 3.7 | 2.3 | 4.3 | 4.7 | 3.1 |
| Purchase accounting deferred revenue discount | 0.5 | 0.4 | 0.3 | 0.2 | 0.7 | 1.1 | 1.3 | 1.4 | 1.4 |
| **Adjusted EBITDA** | **$2.0** | **$2.8** | **$3.6** | **$4.3** | **$5.5** | **$6.8** | **$8.3** | **$9.7** | **$10.8** |

Source: Company information and management


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# Acquisitions



## Project and IT Management

**FEB 2012**
PowerSteering
*Program & Portfolio Management*

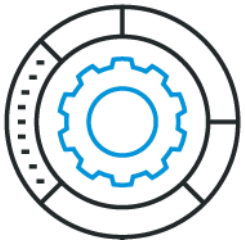
**FEB 2012**
Tenrox
*Professional Services Automation*

**NOV 2012**
EPM Live
*Project Portfolio Management*

**NOV 2013**
ComSci
*IT Financial Management*

**NOV 2014**
Eclipse
*Project Portfolio Management*

**APR 2017**
RightAnswers
*Enterprise Knowledge Management*



## Workflow Automation

**MAY 2013**
FileBound
*Document & Workflow Automation*

**NOV 2015**
Ultriva
*Supply Chain Management*

**MAY 2016**
Advanced Processing and Imaging
*Document & Workflow Automation*

**JAN 2017**
Omtool
*Document Capture & Imaging*

**NOV 2017**
Qvidian
*RFP & Sales Proposal Automation*

**Mar 2018**
InterFAX
*Enterprise Cloud Based Fax and Secure Messaging*



## Digital Engagement

**DEC 2013**
Clickability
*Web Content Management*

**DEC 2014**
Mobile Commons
*Mobile Engagement Management*

**JAN 2016**
LeadLander
*Website Visitor Analytics*

**MAR 2016**
HipCricket
*Mobile Engagement Management*

**JUL 2017**
Waterfall
*Mobile Engagement Management*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# Project & IT Management

Upland's Project & IT Management product family enables you to manage your organization's projects, knowledge, professional workforce, and IT costs.

| Product | Solution | Who It Helps and How | Primary Industries | Key Competitors | Why We Win |
|---|---|---|---|---|---|
| **EclipsePPM** | Project & Work Management | Helps **business leaders and project managers** to drive project execution, management, and prioritization while improving resource utilization, communication, and collaboration among stakeholders, project managers, resource managers, and team members. | Healthcare, Education, Government, Manufacturing, Software, Business Services | Changepoint<br>Microsoft<br>workfront<br>clarizen | • Use-case specific configurations<br>• Breadth of standard feature-set<br>• Ease and speed of implementation |
| **PowerSteering** | Project Portfolio Management (PPM) | Provides **business leaders and PMO's** with a highly configurable top-down cloud-based PPM solution to optimize complex project portfolios, balance capacity against demand, improve financial-based decision making, and align execution of projects to strategy and objectives across large organizations. Uniquely tailored for a variety of use-cases including Lean Six Sigma, Project Management Office (PMO), New Product Development, IT Management, and M&A Management. | Banking & Finance, Healthcare, Manufacturing, Government, Food & Beverage | Changepoint<br>PLANVIEW<br>Innotas by planview | • Better visibility and reporting<br>• Platform power and flexibility<br>• Strong implementation and support services |
| **Tenrox** | Professional Services Automation (PSA) | Gives **professional and business services teams and finance departments** a centralized yet configurable platform to manage their core business operations including project management, resource optimization, project accounting, time and expense management, and billing and revenue recognition. Adapts easily to existing business, finance, and operations processes. | Business Services, Software, Healthcare, Government, Manufacturing, Staffing Services, Financial Services | Changepoint<br>FinancialForce<br>NETSUITE \| OpenAir | • Out-of-the box integrations<br>• Better fit for MSFT environments<br>• Advanced Timesheet features |
| **Timesheet** | Time & Expense Management | Provides **professional and business services teams** with a cloud-based timesheet and expense reporting system, with full mobile capabilities, certified, out-of-the-box integrations to leading financials, HR, CRM, and other enterprise systems. Automates project time and attendance for payroll, project costing, and client billing. | Corporate Services, Technology, Healthcare | REPLICON<br>DOVICO<br>HARVEST<br>Journyx | • Out-of-the-box integrations<br>• Configurable timesheet template designer<br>• Robust reporting |


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# Project & IT Management

Upland's Project & IT Management product family enables you to manage your organization's projects, knowledge, professional workforce, and IT costs.

| Product | Solution | Who It Helps and How | Primary Industries | Key Competitors | Why We Win |
|---|---|---|---|---|---|
| **RightAnswers** | Knowledge Management (KM) for IT Support | Provides **IT support teams** with a centralized cloud knowledge hub to power IT support delivery: live contact agents, web and mobile self-service, and social communities. Knowledge-Paks® library of technical support knowledge provides more than 90,000 solutions for the most commonly used off-the-shelf software applications. | Large Enterprise IT Support | KANA.<br>mindtouch eGain<br>comaround | • Customer Success team<br>• Ease of use<br>• Enterprise scalability<br>• Features for support and self-service<br>• Cost savings |
| **ComSci** | IT Financial Management (ITFM) | Helps **IT financial leaders, business unit leaders, and shared services organizations, like IT & Telecom**, manage and communicate the cost, quality, and value of the services they deliver to the enterprise. Enables collaborative planning and budgeting between IT & Telecom and the lines of business they support, and enables continuous improvement initiatives that drive business transformation. | Large Enterprises in Banking, Finance, Healthcare, and Manufacturing | NICUS<br>APPTIO<br>DIGITALFUEL<br>servicenow | • Managed service delivery model<br>• Customer success<br>• Powerful Telco billing capabilities |


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# Workflow Automation

Upland's Workflow Automation product family enables you to streamline, optimize, automate and secure document-intensive business processes across your enterprise and supply chain.

| Product | Solution | Who It Helps and How | Primary Industries | Key Competitors | Why We Win |
|---|---|---|---|---|---|
| **FileBound** | Document & Workflow Automation | Provides **IT and process owners** in departments like Accounts Payable, Human Resources and Contracts Management with a user-friendly, powerful end-to-end cloud solution for workflow automation and document & forms management with robust analytics and mobile capabilities. Automates repetitive manual workflows and improves the way work flows through the enterprise. | Banking & Finance, Legal, Healthcare | M-Files, Docuware, OnBase by Hyland, Laserfiche, Lexmark | • Workflow capabilities<br>• Strong partner network<br>• Cloud offering<br>• Implementation timeframe/ROI |
| **AccuRoute** | Secure Document Capture & Fax | Empowers secure document process automation for **IT and process owners** through distributed document capture from a variety of sources. All-in-one software platform for enterprise-class secure capture, data extraction and fax that automates document-driven workflows and streamlines business processes. | Banking & Finance, Healthcare, Manufacturing, Government, Business Services, Utilities & Energy, Retail | ADLIB, Ras, PSIGEN software inc., kwiktag, EMC² Captiva, Ephesoft, Nuance | • Robust vertical-focused functionality<br>• Scalability, supportability, integrations, customizable<br>• HP partnership |
| **Ultriva** | Supply Chain Visibility, Collaboration & Execution | Provides **manufacturing plants, suppliers, and manufacturing customers** with a cloud-based single-source platform enabling collaboration with suppliers, sister plants, component manufacturers, distributors, and customers, all in near real-time. | Industrial & Diversified Manufacturing, Healthcare, Aerospace & Defense, Energy, Automotive, Electronics, Sporting Goods, Consumer Package Goods | SAP, Microsoft Dynamics, Oracle, Kinaxis, synchrono, infor, eBECS, Manhattan Associates | • Comprehensive e-Kanban functionality<br>• SaaS offering<br>• Speed of implementation<br>• Execution and analytics |


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# Workflow Automation

Upland's Workflow Automation product family enables you to streamline, optimize, automate and secure document-intensive business processes across your enterprise and supply chain.

| Product | Solution | Who It Helps and How | Primary Industries | Key Competitors | Why We Win |
|---|---|---|---|---|---|
| **Qvidian** | RFP & Sales Proposal Automation | Provides **sales and sales operations** with intelligent workflows through a highly secure and scalable proposal automation solution. Helps organizations access and manage their content, collaborate and create documents, and track and measure outcomes. | Business Services, Financial Services, Insurance/Healthcare, Technology, Telecommunications | springcm, PandaDoc, OCTIV, SAVO, rfpio, PROPOSAL, Conga, Loopio, SEISMIC | • Solution breadth<br>• Deep integration with sales force automation<br>• Ease of use<br>• Professional services |
| **InterFAX** | Cloud Fax & Secure Document Distribution | Enables **IT, process owners and end-users** to communicate easily and more cost-effectively through use-case specific, secure document distribution and enterprise cloud fax capabilities that are fully compliant with numerous vertical specific regulations such as HIPAA, PCI and GDPR. | Financial Services, Retail Branch Communications and Loan Processing, Healthcare, Travel, Food Delivery | RingCentral, eFax, CONCORD TECHNOLOGIES, twilio, myfax, FAXAGE, INNOPORT | • No equipment, software or installation (SaaS offering)<br>• Anytime, anywhere usage<br>• Easy configuration<br>• Guaranteed service continuity<br>• Secure & compliant |


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# Digital Engagement

Upland's Digital Engagement product family enables you to effectively engage with your customers, prospects, and community via the web and mobile technologies.

| Product | Solution | Who It Helps and How | Primary Industries | Key Competitors | Why We Win |
|---|---|---|---|---|---|
| **Clickability** | Web Content Management (CMS) | Gives **marketing teams and content publishers** a powerful and flexible platform to publish and manage content globally, personalize customer experiences, integrate campaigns across multiple channels, and swiftly implement new marketing initiatives. | Software & Hardware, Media & Entertainment, Manufacturing, Utilities, Insurance | sitecore, Adobe, Acquia | • Completeness of solution including strong personalization<br>• Accelerated time-to-market<br>• TCO |
| **LeadLander** | Website Visitor Analytics & Reporting | Provides **sales, marketing, and business development teams** with specific details about each person visiting your website and their trail throughout your site. Generates instant email alerts when tagged companies visit your site plus daily and weekly visitor summaries. | Used across industries by sales, marketing, and business development teams. | visualvisitor, KickFire, LEAD FORENSICS, visitortrack | • Ease of use<br>• Support<br>• Value/Insights |
| **Mobile Messaging** | Enterprise Mobile Messaging & SMS (A2P SMS) | Provides **communications teams, marketers, and program managers** with an enterprise class platform for planning, executing, managing and analyzing complex mobile messaging campaigns. | Healthcare, Government, Business Services, Non-Profits and Advocacy, Consumer Brands, Media & Entertainment | mGage, Revolution Messaging, vibes, voxiva | • Enterprise-grade platform with strong CRM capabilities<br>• Open API<br>• Domain expertise |
| **RightAnswers** | Knowledge Management (KM) for Customer Service | Provides **call center teams** with a centralized cloud knowledge hub to power all contact channels for customer service: live customer contact agents, web and mobile self-service and social communities. User-friendly templates enable every member of your organization to contribute to the knowledge base. | Large Enterprise Call Center for Customer Service | KANA., mindtouch, eGain, comaround | • Customer Success team<br>• Ease of use<br>• Enterprise scalability<br>• Features for support and self-service<br>• Cost savings |


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