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Upland Software

March 2019

Overview

Product & Operating Platforms

M&A Platform

Summary

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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 15, 2019. 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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Overview

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Upland Software at a Glance

UPLD
Russell 2000 Index

EWM
$25B
TAM



HQ Austin, TX
Started 2012

1,000,000
Global Users

9,000
Customers

1,300
Major Accounts
(>$100k Avg. ARR)

$194MM[1]
>90% Recurring

69%[2]
Revenue Growth

37%[3]
Adj. EBITDA

98%[4]
Net DRR

20
Acquisitions To Date

$1.0 Billion +
Enterprise Value

7 Enterprise Cloud Solution Suites

- Customer Experience Management
- Enterprise Sales Enablement
- Professional Services Automation
- Project and Financial Management
- Document Lifecycle Automation
- Secure Document Services
- Enterprise Knowledge Management

Source: Company information and management
(1) Based on the annualized run-rate of total revenue at the mid-point of our guidance range for the quarter ended March 31, 2019 as disclosed in the March 7, 2019 Form 8-K.
(2) Year-over-year recurring revenue growth for the quarter ended December, 31 2018 as disclosed in the March 7, 2019 Form 8-K.
(3) Adjusted EBITDA as a % of revenue based on the quarter ending December 31, 2018 as disclosed in the March 7, 2019 Form 8-K. See slide 32 for definition and reconciliation of Adjusted EBITDA.
(4) As disclosed in the March 7, 2019 Form 8-K.

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Upland Business Model

M&A Platform: Consolidator of Subscale Cloud Providers

Product Platform: Enterprise Cloud Solution Suites

Operating Platform: UplandOne



Singular Focus on **100%** **Customer Success**

+ High growth, high margin recurring revenue model
+ Differentiated, scalable operating platform
+ Large consolidation/arbitrage opportunity
+ Structural competitive advantages (scale, solution suites, margins, customer base, market presence)
+ Capital and tax efficient with high Adjusted FCF conversion
+ Efficient capital allocation and focus on per share value creation
+ Secular tailwinds

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3 Secular Tailwinds Driving Upland's Growth

1

Demand for Automation

Need for automated solutions that are scalable and secure driving market from Frankenstein spreadsheets and manual processes to professional EWM platforms.

Upland's 7 enterprise solution suites automate mission critical business challenges.

2

Transition to Cloud

Need for globally available solutions with rapid speed to value and low TCO driving conversion of $190 Billion annual enterprise application software market from on-premise to cloud (early innings, 38% complete).(1)

Upland's award-winning solution suites are cloud based, globally available, and powered by AWS.

3

Wave of VC Investment

VCs investing tens of billions of dollars annually chasing first two trends creating and funding companies, many of which ultimately enter acquisition pipeline for Upland.

Upland de facto consolidator <$25MM revs cloud providers with scale, margin, product/sales synergies, track record.

(1) BTIG SaaS Industry Report November 2018.

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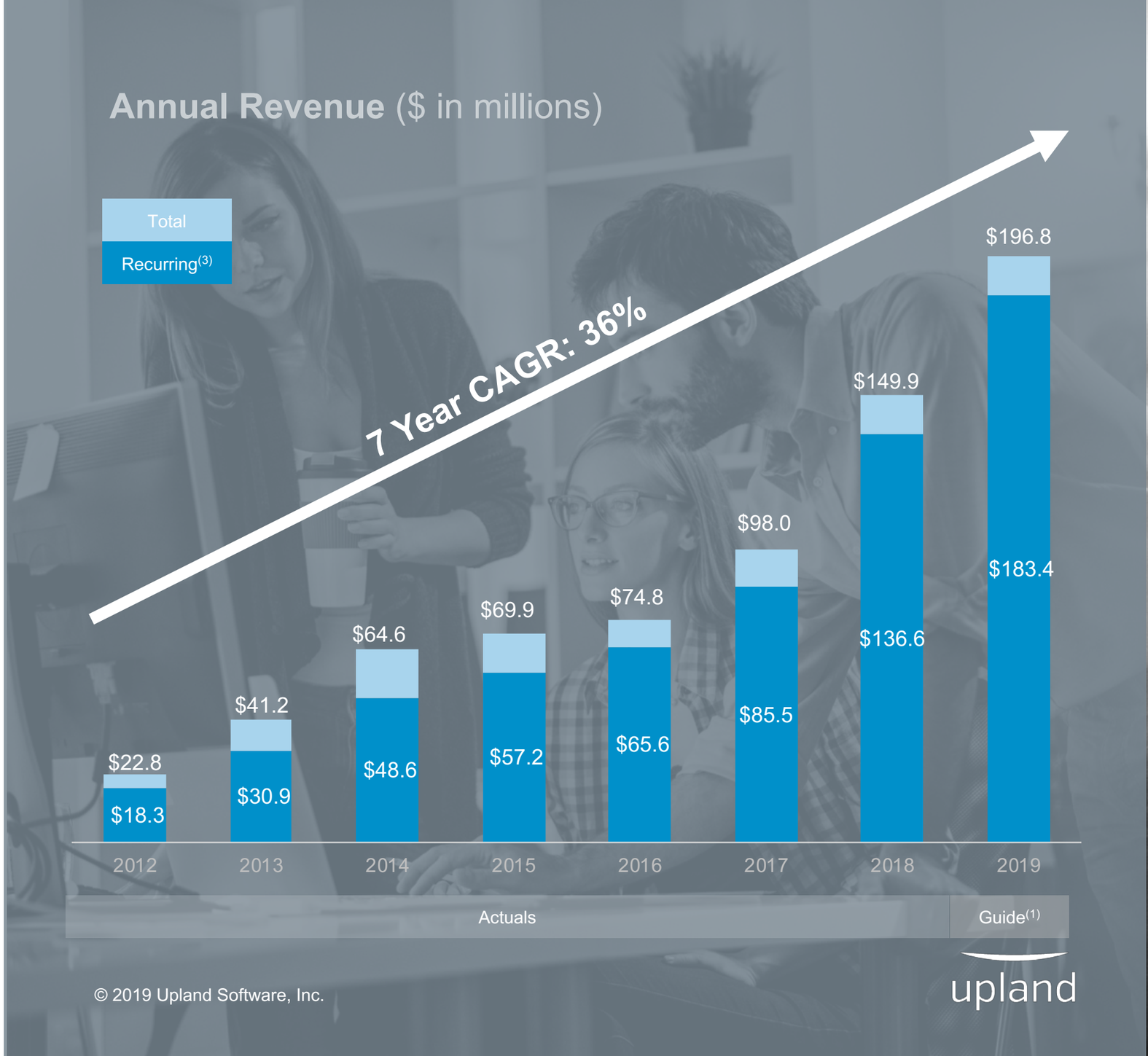
Annual Revenue Growth Trend

Growth Drivers

+ Strong 98% net dollar retention rate(2)
+ Installed base expansion
+ Price uplift, platinum support
+ Cross-sell
+ Efficient new logo acquisition
+ Accretive acquisitions



Source: Company information and management

(1) Based on the midpoint of our guidance range for the year ended December 31, 2019 as disclosed in the March 7, 2019 Form 8-K.
(2) Based on key metric disclosed in the March 7, 2019 Form 8-K.
(3) Recurring revenue is also known as Subscription and Support Revenue.

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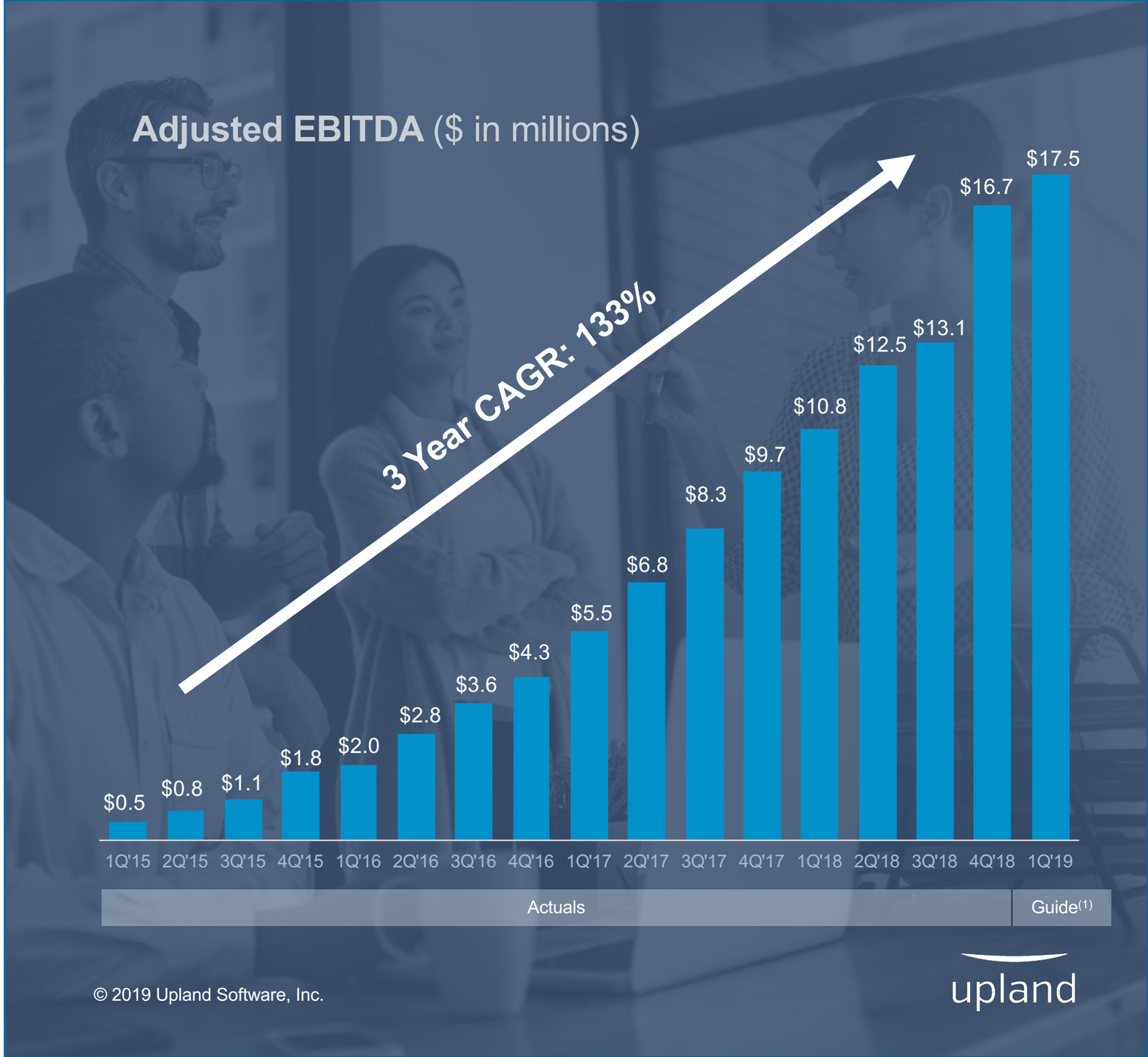
Adjusted EBITDA Growth Trend

Robust, Consistent Margin Expansion

+ Driven by UplandOne operating platform and scale efficiencies
+ 40% Adjusted EBITDA[(2)] long-term margin target



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(2) See slide 32 for definition and reconciliation of Adjusted EBITDA.

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Performance

Capital Stewardship + Value Creation

+ IPO November 2014
+ $1.0 Billion Enterprise Value
+ Met or beat earnings guidance every quarter since IPO (18 consecutive quarters)
+ Share creep +/- 3% per year
+ Target leverage 3-4x AEBITDA(1)
+ $400MM credit facility (~$266MM net debt @ Libor + 400bps = ~6.5%)
+ High Adjusted FCF Conversion: minimal CAPEX and hyper tax efficient (~$135MM usable NOLs)

UPLD Share Price (by month since IPO 11/5/2014)



Source: Company information and management

(1) See slide 32 for definition and reconciliation of Adjusted EBITDA.

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Proven Management Team



Jack McDonald

Founder, Chairman, and CEO

+ Serial entrepreneur and winner of E&Y Entrepreneur of The Year™ Award
+ Led two successful Nasdaq Global Market IPOs (UPLD + PRFT)
+ Created $2.0+ billion shareholder/enterprise value across multiple companies
+ Led PRFT 1999-2010 from startup to $250MM global IT consulting leader
+ Consistent value creation track record as public company Chairman/CEO
+ Executed as CEO over 40 successful technology company acquisitions
+ Raised over $500+ million in equity and debt across 4 companies

PERFICIENT · BLOCKBUSTER · Skadden



Tim Mattox

President and COO

+ Executive at Dell, Inc. (1998-2013)
  + Ran worldwide product marketing (80% of Dell's revenue)
  + Led global operations for pricing, forecasting, and enterprise product launch (50% of Dell's profits)
  + Led corporate strategy reporting to CEO/Chairman
  + Ran Americas marketing to companies >400 employees
  + 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

DELL · BAIN & COMPANY · ORACLE · MIT · Stanford



Mike Hill

CFO

+ Member of Upland founding team
+ CFO Perficient, Inc. (NASDAQ: PRFT) (2004-2007) from $30 million to over $200 million annual revenue run-rate
+ Consistent value creation track record as public company CFO
+ Executed as CFO over 30 successful technology acquisitions across 3 companies
+ Raised over $500 million in equity and debt across 3 companies
+ Started career at Ernst & Young LLP (1991 – 1999)
+ BBA from University of Texas

PERFICIENT · EY · TEXAS The University of Texas at Austin

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Recent Developments

October 2018



Upland Acquires Rant & Rave

Accretive acquisition adds $21 million in annualized revenues, extends Upland's global leadership in cloud-based mobile engagement, and expands European presence

Customer Experience Management

December 2018



Upland Acquires Adestra

Accretive acquisition brings $18 million in annualized revenue and adds core component to Customer Experience Management (CXM) Suite

Customer Experience Management

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Upland Announces Solution Suites

Seven Cloud Solution Suites Promise to Maximize Value for Customers and Increase Upland's Organic Growth Potential

Solutions

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Upland Announces Q4 Earnings(1)

+ Record Revenues and AEBITDA(2)
+ 18th consecutive quarters of meeting or beating guidance
+ 10% organic growth(1)
+ 37% AEBITDA Margin(2)

Earnings

Source: Company information and management
(1) As disclosed in the March 7, 2019 Form 8-K.
(2) See slide 32 for definition and reconciliation of Adjusted EBITDA

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Product Platform and UplandOne Operating Platform

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Upland Enterprise Solution Suites

Work Management Solution Suites That Deliver Powerful Results

	Sales and Marketing Suites		Project & IT Management Suites		Workflow Automation Suites		
Suite	**Customer Experience Management**	**Enterprise Sales Enablement**	**Professional Services Automation**	**Project and Financial Management**	**Document Lifecycle Automation**	**Secure Document Services**	**Enterprise Knowledge Management**
Value	**Deliver** outstanding customer experiences	**Win** more deals faster	**Transform** services delivery	**Convert** cost centers into value drivers	**Streamline** high-volume processes	**Ensure** data security and compliance	**Enable** enterprise knowledge-sharing
Solutions	Customer Engagement Voice of Customer Mobile Messaging Email and Marketing Automation Knowledge Management	RFP and Sales Proposal Automation Customer References Management Sales Content Delivery Website Visitor Management Voice of Customer	Core PSA Proposal and SOW Automation Knowledge Management Customer References Management Voice of Customer	Project and Portfolio Management (PPM) IT Financial Management Telecom Expense Management Knowledge Management	Vendor Management Contracts Management HR and Legal Solutions Sales and Marketing Lifecycle Solutions	Capture Automation Integrated and Compliant Fax and Cloud Fax Records Management and Retention Adherence	KM for Customer Service KM for IT Support KM for Self-Service

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Product Platform: Architecture

Common UI/UX

Single Sign On (SSO)

Upland Analytics

Upland Mobile

Upland Work Center



Customer Experience Management

Sales Enablement

Professional Services Automation

Project and Financial Management

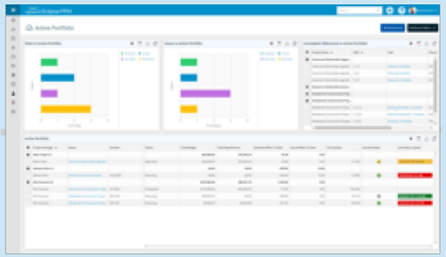
Document Lifecycle Automation

Secure Content Services

Enterprise Knowledge Management

7 Enterprise Solution Suites







16 Enterprise Work Management Products

Upland Integration Platform

Integrations Powered by Dell Boomi

Enterprise-Grade Cloud Platform

amazon web services

Enterprise-Grade Cloud Platform

LinkedIn Marketo ORACLE salesforce infor SAP Microsoft Dynamics CONCUR ADP

Key Third-Party Applications

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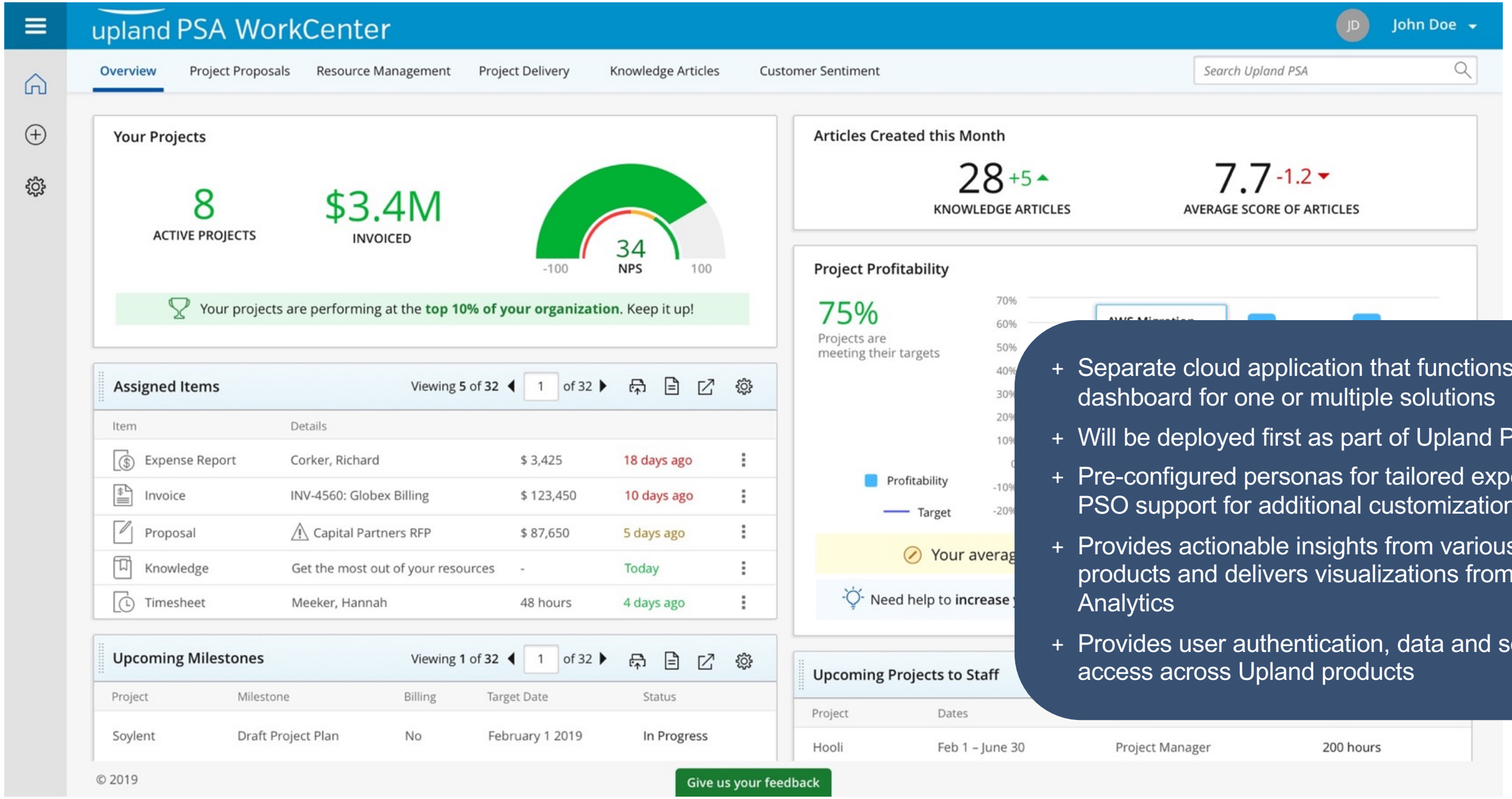
Product Platform: WorkCenter™



- Separate cloud application that functions as a dashboard for one or multiple solutions
- Will be deployed first as part of Upland PSA
- Pre-configured personas for tailored experiences; PSO support for additional customization
- Provides actionable insights from various Upland products and delivers visualizations from Upland Analytics
- Provides user authentication, data and security access across Upland products

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9,000+ Customers

Financial Services

BNY MELLON · Fidelity Investments · ING · JPMorganChase · Raymond James · Goldman Sachs · MUFG Bank of Tokyo-Mitsubishi UFJ · SunTrust · Wells Fargo

Manufacturing, Industrial

Johnson Controls · PPG Industries · Duke Energy · ThermoFisher Scientific · Emerson · Abbott · CNH · Eaton · Ingersoll Rand Inspiring Progress · Rockwell Collins

Government, Nonprofit, Education

Sierra Club · PETA · American Red Cross · Planned Parenthood · The Nature Conservancy · United States Navy · Human Rights Campaign · CUNY The City University of New York · National Association of Realtors · NYC Human Resources Administration

Corporate Services

Xerox · Ricoh · tyco · CenturyLink · ADP · hp · fiserv.

Technology

Adobe · Ericsson · First Data · Siemens · SAP · CDW · Cisco · GE · Dell

Healthcare

UnitedHealthcare Medicare Solutions · Pfizer · Merck · Cigna · McKesson

Media

Disney · Mc Graw Hill Education · Allured business media · Viacom · iHeart Radio · gray · The McGraw-Hill Companies · NBC Universal · StarTribune · SAGE Publishing · FP News Papers Inc

Consumer, Restaurant, Retail

AVIS · Mary Kay · Kellogg's · Harley-Davidson · Staples · Callaway Golf · PepsiCo · Life Fitness · Coca-Cola · Carrefour · AAA · Sargento · MillerCoors · Whataburger

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Why Customers Choose Upland

Award-Winning Cloud Products

You get a trusted, award-winning cloud solution or suite that's purpose-built for your business need, not bloated 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.

100%



The Scale and 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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Operating Platform: UplandOne

The Foundation for Customer Success

uplandOne

High-Touch Customer Success Program

Quality-Focused R&D

Customer-Driven Innovation



Enterprise-Grade Cloud Platform

Exceptional Global Support

Expert Professional Services

GOAL

100% CUSTOMER SUCCESS

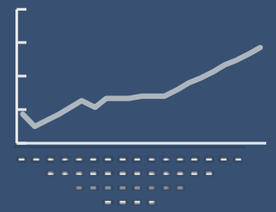
(Value + Experience)

MEASUREMENT

Net Promoter **Score**

Financial **Strength**

Customer Relationship **Depth**



Customer-Defined **Value**

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Selected Land and Expand Customer Successes

Industry	Solution Suite	Join Date	Starting ARR	Q4'18 ARR	Expansion Amount	CAGR %
Manufacturing	Business Operations	Q4'15	$30,800	$375,000	$344,200	130%
IT Software and Services	Enterprise Sales Enablement	Q3'18	$332,000	$404,004	$72,004	119%
Software	Enterprise Sales Enablement	Q3'18	$318,500	$385,292	$66,792	114%
Advocacy Nonprofit	Customer Experience Management	Q2'17	$154,500	$352,776	$198,276	73%
Restaurant	Customer Experience Management	Q3'17	$534,000	$942,792	$408,792	58%
Retail	Customer Experience Management	Q3'17	$348,000	$604,644	$256,644	56%
IT Services	Project and Financial Management	Q3'16	$163,042	$402,432	$239,389	49%
Advertising	Customer Experience Management	Q3'17	$274,660	$434,757	$160,097	44%
IT HW, SW, & Services	Enterprise Sales Enablement	Q4'17	$350,000	$500,000	$150,000	43%
Media and Broadcasting	Customer Experience Management	Q1'15	$190,333	$653,874	$463,541	39%
Financial Services	Enterprise Knowledge Management	Q2'17	$682,126	$1,095,000	$412,874	37%
Staffing	Professional Services Automation	Q1'12	$67,416	$378,197	$310,781	29%
Financial Services	Project and Financial Management	Q1'14	$128,000	$414,000	$286,000	28%
Cosmetics	Professional Services Automation	Q1'12	$85,812	$424,258	$338,446	27%
Consumer Packaged Goods	Project and Financial Management	Q1'12	$163,226	$782,653	$619,428	26%
Automotive	Project and Financial Management	Q1'12	$132,000	$522,266	$390,266	23%
IT HW, SW, & Services	Secure Document Services	Q1'17	$1,772,796	$2,484,000	$711,204	21%
Municipal Government	Customer Experience Management	Q4'14	$174,000	$356,400	$182,400	20%

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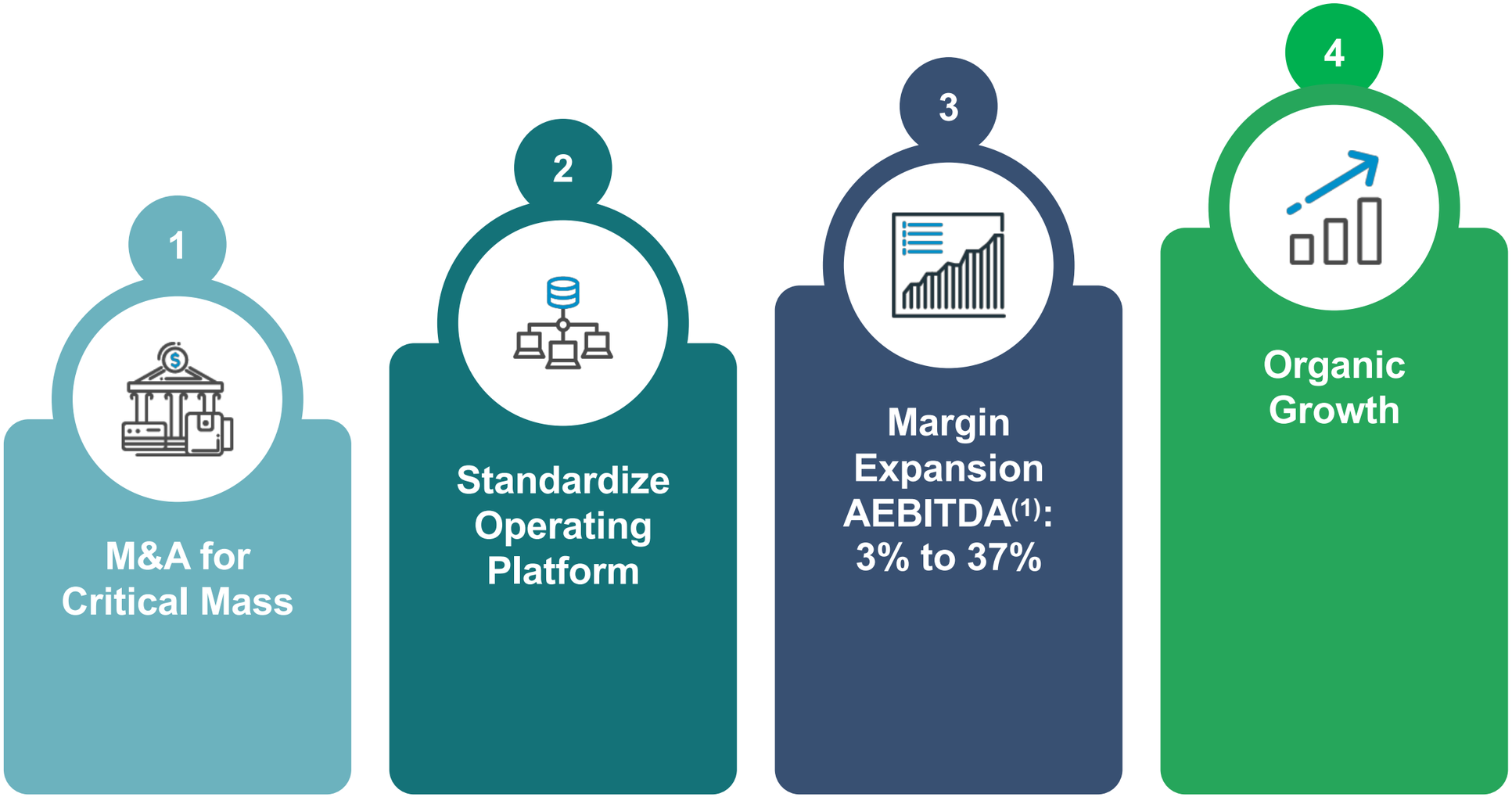
Stages of Upland's Evolution



Source: Company information and management

(1) See slide 32 for definition and reconciliation of Adjusted EBITDA. 3% AEBITDA as reported for Q1 2015 and 37% AEBITDA as reported for Q4 2018.

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Sales Headcount

	Q1'17	Q4'18
Field Sales	3	28
Inside Sales	24	37
Total	**27**	**65**
Recurring Revenue Organic Growth(1)	*3%*	*7%*
Adjusted EBITDA(2)	*26%*	*37%*

Source: Company information and management
(1) Average of T4Q quarterly YoY organic growth rate.
(2) See slide 32 for definition and reconciliation of Adjusted EBITDA
(3)For the quarter ended December 31, 2018 as reported in the March 7, 2019 Form 8-K.

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Efficient Sales Investment

Sales Investment

- In the past 8 quarters, have more than doubled Sales HC and recurring revenue organic growth rate while increasing AEBITDA(2) margins by 1,100 basis points
- S&M spend is currently 13% of Revenue(3)
- UPLD will continue to invest in additional sales and sales enablement consistent with an efficient GEI and upwardly ramping AEBITDA(2) margin to long-term goal of 40%
- Field Sales (28)
  - Organized geographically
  - Cross-trained to spot and refer sales opportunities to expand solution suites
- Inside Sales (37)
  - Aligned to solution areas
  - Includes Partner Account Managers (PAM)

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M&A Platform

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M&A Platform



Goals and Track Record

- Add $25-$50MM acquired annualized revenue run-rate per year
- 20 acquisitions to date @ 0.9x-3.4x revs
- Strong reputation
- Banker network and pipeline
- CEO has done 40 successful tech acquisitions in 20 years



Strategic Fit

- Enterprise cloud
- Proven, sticky technology
- Fortune 2000 and major mid-size customer base
- Build out solution suites
- US, Canada, EMEA



Financial Fit

- $5-25MM Revenue
- 10-15% Organic Growth
- 90%+ NDRR
- 70%+ Cash Gross Margins
- F2K+ MMS Customer Base = 80% Revs
- Average ARR per Major Account > $25K



Deal Fit

- VC owners want to exit
- VC check size up to $75MM
- 5-8X Pro Forma Adj. EBITDA(1)

Source: Company information and management

(1) See slide 32 for definition and reconciliation of Adjusted EBITDA

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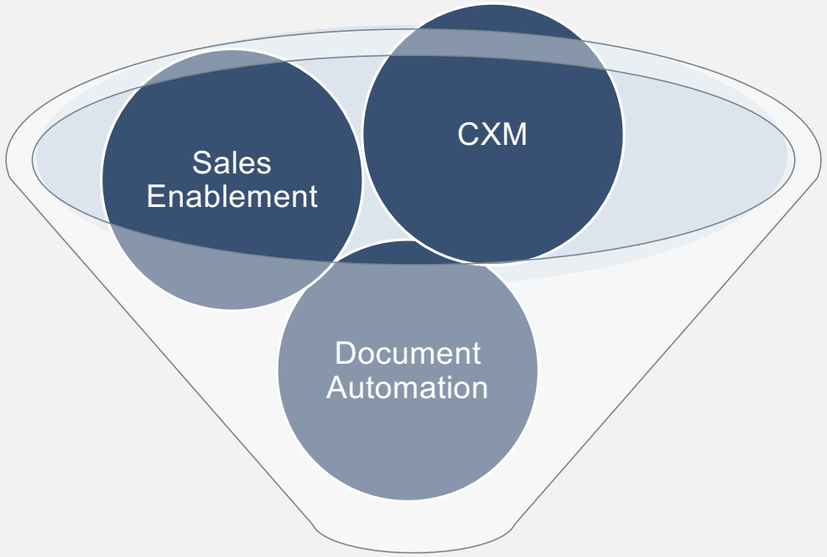
M&A Platform: Orphaned Cloud Provider Opportunity

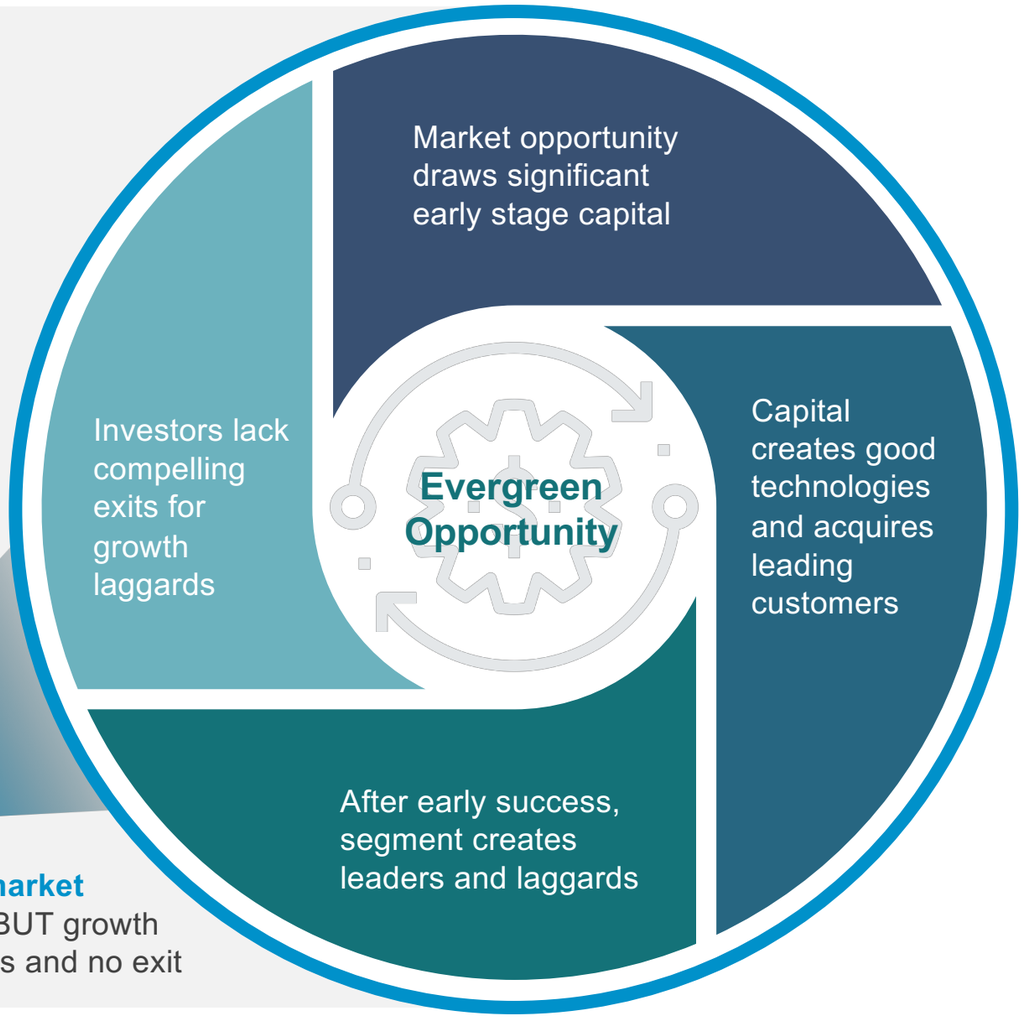
$212 Billion VC Cloud investment since 2002(1)



IPO or Strategic Exit

Out of Business

Investment "orphans"



Orphaned businesses are our target market

Proven technology, Fortune 2000 customers, BUT growth stalled at 10-15%(2), with outsized cost structures and no exit

(1) PwC/CBInsights MoneyTree™ data explorer Q1 2010 to Q4 2018 filtered by Sector: Software (non-internet/mobile) or Internet AND Stage: Seed Stage or Early Stage or Expansion Stage or Later Stage or Other

(2) Management estimate.

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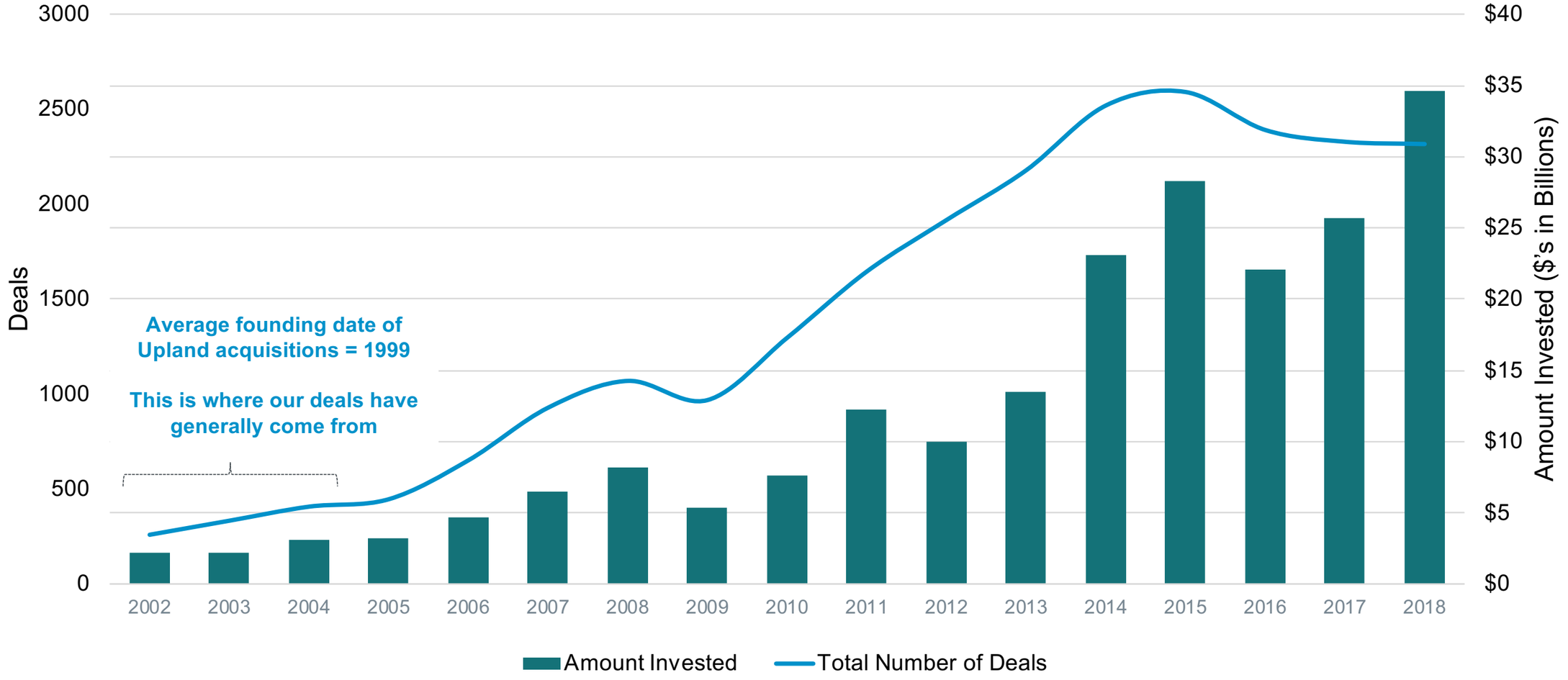
Growing Wave of VC Investment in Software

($ and Deal Count)



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Prototype Acquisition: UplandOne Transformation

10-15%
Organic Growth Target

0%
Contribution Margin



1	2
100% Customer Success Best-Practices	**Operational Efficiencies**
Move products to AWS	Eliminate wasteful spend
Common UI/UX + SSO	PSO margins from negative to 40%
24/7 global customer support	Global outsourcing of R&D
Quarterly Virtual User Conferences	Rationalize S&M spend
Executive customer outreach	Minimal capex spend
Customer feedback loop into R&D	Standardized processes, procedures, and templates
Improve product foundations: speed, performance, uptime, security, and scalability	Consolidate vendors and rationalize office space
Added analytics and mobile capabilities	Share best practices throughout organization

5-10%
Organic Growth Target

50%
Contribution Margin Target(1)

(1) Contribution Margin is product level AEBITDA excluding corporate overhead and shared service organization costs. See slide 32 for definition and reconciliation of Adjusted EBITDA.

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Appendix

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Operating Targets (as a % of Revenue)

	2Q'17	3Q'17	4Q'17	1Q'18	2Q'18	3Q'18	4Q'18	Target Model
Revenue	100%	100%	100%	100%	100%	100%	100%	**100%**
Non-GAAP Gross Margin(1)	72%	71%	72%	73%	74%	73%	72%	**75%**
Research & Development	16%	14%	14%	15%	13%	13%	12%	**12%**
Sales & Marketing	17%	16%	13%	14%	14%	14%	13%	**13%**
General & Administrative	15%	14%	14%	15%	14%	13%	12%	**10%**
Adjusted EBITDA(2)	29%	32%	35%	34%	35%	35%	37%	**40%**

Excludes Depreciation & Amortization and Stock-Based Compensation

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 32 for definition and reconciliation of Adjusted EBITDA.

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Adjusted EBITDA Reconciliation to Net Income (Loss)
(in Millions)

	4Q'16	1Q'17	2Q'17	3Q'17	4Q'17	1Q'18	2Q'18	3Q'18	4Q'18
Net Income (Loss)	$(2.0)	$(5.6)	$(5.8)	$(3.5)	$(3.8)	$(3.2)	$(5.2)	$(4.2)	$1.8
Depreciation and amortization expense	2.3	2.4	2.6	3.1	3.8	4.2	5.0	5.4	6.7
Interest expense, net	0.8	0.9	1.2	2.3	2.2	2.5	3.1	3.1	4.5
Other expense (income), net	(0.4)	0.1	0.0	0.1	(0.5)	(0.3)	0.5	0.7	0.8
Loss on debt extinguishment	-	-	1.6	(1.6)	-	-	-	-	-
Provision for (benefit from) income taxes	1.0	1.0	0.2	0.4	(0.3)	0.5	0.9	0.7	(11.9)
Stock-based compensation expense	1.7	2.3	3.6	1.9	2.2	2.6	4.0	3.8	3.8
Acquisition-related expense	0.7	3.7	2.3	4.3	4.7	3.1	3.1	2.5	10.0
Purchase accounting deferred revenue discount	0.2	0.7	1.1	1.3	1.4	1.4	1.1	1.1	1.0
Adjusted EBITDA	**$4.3**	**$5.5**	**$6.8**	**$8.3**	**$9.7**	**$10.8**	**$12.5**	**$13.1**	**$16.7**

Source: Company Information

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.

Above is a reconciliation of Adjusted EBITDA to net income (loss), the most directly comparable GAAP measure.

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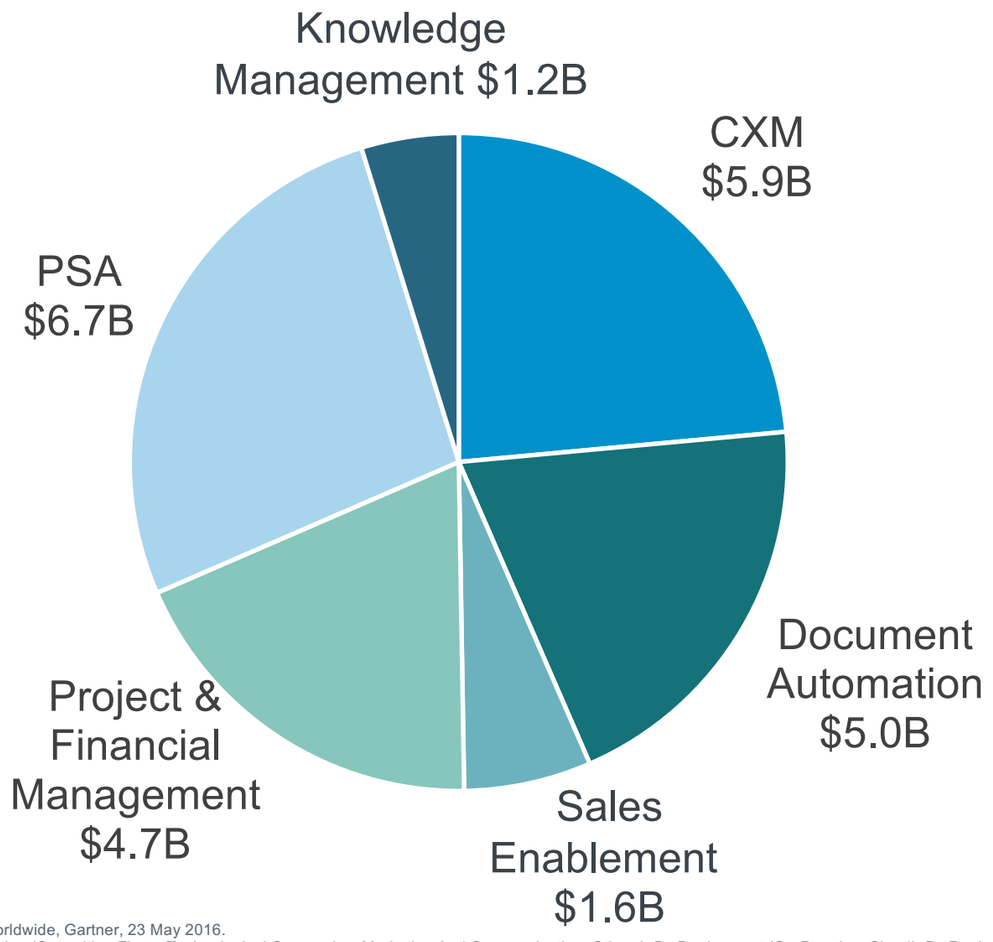
Total Addressable Market $25B



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Acquisitions To Date

FEB 2012 **PowerSteering**
Project Portfolio Management

FEB 2012 **Tenrox**
Professional Services Automation

NOV 2012 **EPM Live**
Project & Work Management

MAY 2013 **FileBound**
Document & Workflow Automation

NOV 2013 **ComSci**
IT Financial Management

DEC 2013 **Clickability**
Enterprise Web Content Management

NOV 2014 **Eclipse PPM**
Project & Work Management

DEC 2014 **Mobile Commons**
Enterprise Mobile Messaging & SMS

NOV 2015 **Ultriva**
Supply Chain Management

JAN 2016 **LeadLander**
Website Visitor Analytics & Reporting

MAR 2016 **Hipcricket**
Enterprise Mobile Messaging & SMS

MAY 2016 **API**
Document & Workflow Automation

JAN 2017 **Omtool (AccuRoute)**
Secure Document Capture & Fax

APR 2017 **RightAnswers**
Enterprise Knowledge Management

JUL 2017 **Waterfall**
Enterprise Mobile Messaging & SMS

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

MAR 2018 **InterFAX**
Enterprise Cloud-Based Fax

JUN 2018 **RO Innovation**
Customer Reference & Sales Enablement

OCT 2018 **Rant & Rave**
Cloud-Based Customer Engagement

DEC 2018 **Adestra**
Email Marketing Automation & Analytics

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Customer Experience Management

Deliver outstanding customer experiences

Product	Solution	Who It Helps and How	Primary Industries	Key Competitors	Why We Win
Rant & Rave	Cloud-Based Customer Engagement Solutions	Enables **contact center users** to capture, analyze, and act on real-time customer and employee feedback across multiple channels including SMS/mobile, email, web, and social media.	Energy, Utilities, Retail, Hospitality, Entertainment, Finance, Public Sector, Business Services, Telecommunications, Managed Services, Transportation, and Logistics	qualtrics, MEDALLIA	• Actionable insights from real-time feedback • Industry leading sentiment engine • 'Frontline Engagement' module which gamifies agent feedback • Robust data visualization • Engagement across multiple channels
Mobile Messaging	Enterprise Mobile Messaging & SMS (A2P SMS)	Provides **communications teams, marketers, & 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, Restaurant, Retail	interactive, vibes, mGage, REVOLUTION MESSAGING	• Enterprise-grade platform with strong CRM capabilities • Open API • Domain expertise
Adestra	Enterprise-Grade Email Marketing, Automation, & Analytics	Provides **marketing teams** with enterprise-grade customer engagement technology that brings together email, marketing automation, and customer data and analytics into a powerful solution.	Restaurant and Retail, Travel, Media and Publishing, and Nonprofits	Adobe Marketing Cloud, salesforce marketing cloud, selligent MARKETING CLOUD	• Industry leading support • Configurable platform meets nearly any organization's requirements • Simple visual automation tool • Powerful campaign & email editor
RightAnswers	Enterprise Knowledge Management (KM)	Provides **call center & IT support teams** with a centralized cloud knowledge hub to power all customer contact channels and IT support: 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 & IT Services, Financial Services, Education	KANA., eGain, mindtouch, comaround	• Customer success team • Ease of use • Enterprise scalability • Features for support and self-service • Cost savings
Clickability	Enterprise Web Content Management (CMS)	Gives **marketing teams & 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	Drupal™, Acquia, Adobe, frankly data, sitecore	• Completeness of solution including strong personalization • Accelerated time-to-market • TCO

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Customer Experience Management

Deliver outstanding customer experiences

Product	Solution	Key Customers	Use Cases	Key Buyers
Rant & Rave	Cloud-Based Customer Engagement Solutions		• Voice of Customer • Voice of Employee • Voice of Candidate • Customer Recovery • Contact Center Gamification • Silent Shopper	• Chief Customer Officer • Dir of Customer Success / Experience • Dir of Customer Care • Head of Customer Insights • Performance Excellence • Contact Center Director • Dir of Operations
Mobile Messaging	Enterprise Mobile Messaging & SMS (A2P SMS)		• Advocacy, Fundraising & Volunteer Engagement • Voter Registration • Media Campaigns • Consumer Insights • Exclusive Offers & Promotions or Couponing • Customer Engagement & Support • Insurance Enrollment • Appointment Reminders	• VP of Marketing/Communications • Customer Experience Manager • Digital New Media • Policy Maker • Product Manager • Dir of Outreach
Adestra	Enterprise-Grade Email Marketing, Automation, & Analytics		• Transactional, triggered email communications • Automated email marketing programs • Cross-channel marketing • Personalized one-to-one email targeting	• CMO/VP Marketing • Head of CRM • Head of Customer Acquisition • Head of Customer retention • Head of Email Marketing
RightAnswers	Enterprise Knowledge Management (KM)		• Enterprise search to find answers in all repositories • Self-service portal to deflect calls from contact center agents • Out-of-the-box knowledge articles for IT Help Desks within the ServiceNow environment	• Director, IT Service Management • VP/Director Customer Service • VP/Director Customer Support • Director, Knowledge Management
Clickability	Enterprise Web Content Management (CMS)		• Internal websites • Highly complex, media-intensive websites • Sales and marketing campaigns	• CMO/VP of Marketing • CRO/VP of Sales • Online Publishers • IT

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Enterprise Sales Enablement

Win More Deals Faster

Product	Solution	Who It Helps and How	Primary Industries	Key Competitors	Why We Win
Qvidian	RFP & Sales Proposal Automation	Enables **sales & proposal professionals** to automate the creation of RFP responses, proactive proposals, and other sales content to win more business by improving processes, productivity, and content effectiveness. Delivers intelligent workflows and improved sales effectiveness 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	rfpio, Loopio, PROPOSAL SOFTWARE.COM, SEISMIC, OCTIV, Xait, OMBUD, Qorus, RFP365	• Robust functionality • Security, compliance, scalability • Expert technical, professional services, and training teams • Proven history and expertise
RO Innovation	Customer Reference & Sales Enablement	Helps **customer success, sales, & marketing personnel** create, deploy, manage, and measure customer reference and sales enablement content, turning the advocacy of satisfied customers into highly effective sales assets.	Business Services, Financial Services, Technology, Telecommunications	point of reference, influitive	• Enterprise Class Solution • More flexible and lower TCO • Technology agnostic
LeadLander	Website Visitor Analytics & Reporting	Provides **sales, marketing, & 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 • Support • Value/Insights
Rant & Rave	Cloud-Based Customer Engagement Solutions	Enables **contact center users** to capture, analyze, and act on real-time customer and employee feedback across multiple channels including SMS/mobile, email, web, and social media.	Energy, Utilities, Retail, Hospitality, Entertainment, Finance, Public Sector, Business Services, Telecommunications, Managed Services, Transportation, and Logistics	qualtrics, MEDALLIA	• Actionable insights from real-time feedback • Industry leading Sentiment Engine • 'Frontline Engagement' module which gamifies agent feedback • Robust data visualization • Engagement across multiple channels

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Enterprise Sales Enablement

Win More Deals Faster

Product	Solution	Key Customers	Use Cases	Key Buyers
Qvidian	RFP & Sales Proposal Automation	citi, HSBC, Bank of America, Wells Fargo, IBM, Canon, Cisco, Citizens Bank, State Street, Morgan Stanley, Sprint, SAP, UnitedHealthcare, ING Bank, Fidelity	• RFP and RFI response automation • Security and due diligence questionnaires • Statements of work (SOWs) • Proactive proposals & presentations • Central, secure content library	• Proposal and RFP Managers • VP/Director of Sales • VP/Director of Sales Operations • VP/Director of Marketing
RO Innovation	Customer Reference & Sales Enablement	workday., vmware, DELL EMC, NUANCE, jda., CERIDIAN, Microsoft, FINASTRA, Marketo	• Automate customer reference fulfillment • Centralized customer advocacy database • Send & track content engagement • Readily available assets to support buyer's journey • Centralized content library	• Customer Reference/Advocacy Managers • VP Marketing • VP Sales/Sales Ops • VP Customer Success
LeadLander	Website Visitor Analytics & Reporting	BAIRD, ixia, Precious Plate, interline, CyrusOne	• Lead Generation • Follow-up Activity • Business Development • Marketing Campaigns • Competitive Intelligence • Executive Outreach	• Marketing Agencies • Sales • Business Development • Marketing
Rant & Rave	Cloud-Based Customer Engagement Solutions	acer, Linde, Nationwide, sage, dpd, Scottish Water, sky, Thames Water, vodafone, MISSGUIDED, npower, energy, RBS, MARKS & SPENCER, Premier Inn, VOLKSWAGEN FINANCIAL SERVICES, easyJet, extraenergy, HomeServe, CAPITA, TOYOTA FINANCIAL SERVICES, Dunelm, CALOR, BARCLAYS, Flagship Homes, BOC, Hastings DIRECT	• Voice of Customer • Voice of Employee • Voice of Candidate • Customer Recovery • Contact Center Gamification • Silent Shopper	• Chief Customer Officer • Dir of Customer Success / Experience • Dir of Customer Care • Head of Customer Insights • Performance Excellence • Contact Center Director • Dir of Operations

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Professional Services Automation

Transform services delivery

Product	Solution	Who It Helps and How	Primary Industries	Key Competitors	Why We Win
Tenrox	Professional Services Automation (PSA)	Gives **professional and business services teams & 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.	IT/Management Consulting, Business/Financial Services, Software, Healthcare, Government, Manufacturing	Mavenlink, FinancialForce, Changepoint, NETSUITE, OpenAir	• Out-of-the box integrations • Better fit for MSFT environments • Advanced timesheet features
Qvidian	RFP & Sales Proposal Automation	Enables **professional and business services teams & finance departments** to automate the creation of RFP responses, proactive proposals, and other sales content to win more business by improving processes, productivity, and content effectiveness. Delivers intelligent workflows through a highly secure and scalable proposal automation solution.	IT/Management Consulting, Business/Financial Services, Software, Healthcare, Government, Manufacturing	rfpio, Loopio, PROPOSAL SOFTWARE.COM, SEISMIC, OCTIV, Xait, OMBUD, Qorus, RFP365	• Robust functionality • Security, compliance, scalability • Expert technical, professional services, and training teams • Proven history and expertise
RightAnswers	Enterprise Knowledge Management (KM)	Provides **professional and business services teams & finance departments** with the information they need to encourage collaboration, keep projects on track for on-time, on-budget delivery with the highest quality, while ensuring resources and projects are aligned with corporate governance requirements.	IT/Management Consulting, Business/Financial Services, Software, Healthcare, Government, Manufacturing	KANA, eGain, mindtouch, comaround	• Customer success team • Ease of use • Enterprise scalability • Features for support and self-service • Cost savings
RO Innovation	Customer Reference & Sales Enablement	Helps **professional and business services teams to** automate customer reference management and accelerate new deals to grow their business.	IT/Management Consulting, Business/Financial Services, Software, Healthcare, Government, Manufacturing	point of reference, influitive	• Enterprise Class Solution • More flexible and lower TCO • Technology agnostic
Rant & Rave	Cloud-Based Customer Engagement Solutions	Enables **professional and business services teams** to capture, analyze, and act on real-time customer and employee feedback across multiple channels.	IT/Management Consulting, Business/Financial Services, Software, Healthcare, Government, Manufacturing	qualtrics, MEDALLIA	• Actionable insights from real-time feedback • Industry leading sentiment engine • Robust data visualization • Engagement across multiple channels

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Professional Services Automation

Transform services delivery

Product	Solution	Key Customers	Use Cases	Key Buyers
Tenrox	Professional Services Automation (PSA)	TELUS | HEALTH, FICO, AAA, jda., EATON, AUTODESK, GE, ESTÉE LAUDER	• Professional Services Automation (PSA) • Resource Management • Project Financial Management	• CFO • CIO • VP of Services • VP of Operations
Qvidian	RFP & Sales Proposal Automation	citi, HSBC, Bank of America, Wells Fargo, IBM, Canon, cisco, Citizens Bank, State Street, Morgan Stanley, Sprint, SAP, UnitedHealthcare, ING BANK, Fidelity	• RFP and RFI response automation • Security and due diligence questionnaires • Statements of work (SOWs) • Proactive proposals & presentations • Central, secure content library	• CFO • CIO • VP of Services • VP of Operations
RightAnswers	Enterprise Knowledge Management (KM)	Allstate, PAYCHEX, Whataburger, NORDSTROM, DUKE ENERGY, Pfizer, Coca-Cola, Dignity Health, LinkedIn	• Enterprise search to find answers in all repositories • Self-service portal • Out-of-the-box knowledge articles	• CFO • CIO • VP of Services • VP of Operations
RO Innovation	Customer Reference & Sales Enablement	workday, vmware, DELL EMC, NUANCE, jda., CERIDIAN, Microsoft, FINASTRA, Marketo	• Automated customer reference fulfillment • Centralized customer advocacy database • Send & track content engagement • Centralized content library	• CFO • CIO • VP of Services • VP of Operations
Rant & Rave	Customer Enablement & Sentiment Management	acer, Linde, Nationwide, sage, dpd, Scottish Water, sky, Thames Water, vodafone, MISSGUIDED, npower, energy, RBS, MARKS & SPENCER, Premier Inn, VOLKSWAGEN FINANCIAL SERVICES, easyJet, extraenergy, HomeServe, CAPITA, TOYOTA FINANCIAL SERVICES, Dunelm, CALOR, BARCLAYS, Flagship Homes, BOC, Hastings DIRECT	• Voice of Customer • Voice of Employee	• CFO • CIO • VP of Services • VP of Operations

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Project and Financial Management

Convert cost centers into value drivers

Product	Solution	Who It Helps and How	Primary Industries	Key Competitors	Why We Win
PowerSteering	Project Portfolio Management (PPM)	Provides **business leaders & 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.	Banking & Finance, Healthcare, Manufacturing, Government, Food & Beverage	Changepoint, PLANVIEW, Innotas by planview	• Better visibility and reporting • Platform power and flexibility • Strong implementation and support services
ComSci	IT Financial Management (ITFM)	Helps **IT financial leaders, business unit leaders, & 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 SOFTWARE, DIGITALFUEL, APPTIO, servicenow	• Managed service delivery model • Customer success • Powerful Telco billing capabilities
Eclipse	Project & Work Management	Helps **business leaders & 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, Legal, Government, Manufacturing, Software, Business Services	Innotas by planview, workfront, clarizen	• Use-case specific configurations • Breadth of standard feature-set • Ease and speed of implementation
RightAnswers	Enterprise Knowledge Management (KM)	Provides **business leaders & PMOs** with a centralized cloud knowledge hub to to encourage collaboration, keep projects on track for on-time, on-budget delivery with the highest quality, while ensuring resources and projects are aligned with corporate governance requirements.	Banking & Finance, Healthcare, Manufacturing, Government, Food & Beverage	KANA, eGain, mindtouch, comaround	• Customer success team • Ease of use • Enterprise scalability • Features for support and self-service • Cost savings
FileBound	Document & Workflow Automation	Provides **business leaders & PMOs** with a user-friendly, powerful end-to-end cloud solution for workflow automation and document & forms management with robust analytics.	Banking & Finance, Healthcare, Manufacturing, Government, Food & Beverage	M-Files, Docuware, OnBase by Hyland, Laserfiche, opentext	• Workflow capabilities • Integration with PPM • Implementation timeframe/ROI

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Project and Financial Management

Convert cost centers into value drivers

Product	Solution	Key Customers	Use Cases	Key Buyers
PowerSteering	Project Portfolio Management (PPM)	Save the Children, PRAXAIR, molex, Memorial Sloan Kettering Cancer Center, Johnson Controls, PEPSICO, CHURCH PENSION GROUP	• Lean Six Sigma • Project Management Office (PMO) • New Product Development • IT Management • M&A Management	• VP Process Excellence • Director Continuous Improvement • Black Belt/Project Manager • CIO/Director of Innovation • Chief Strategy Officer/Director of Strategy • PMO Director/VP PMO • IT Director
ComSci	IT Financial Management (ITFM)	vodafone, Memorial Sloan Kettering Cancer Center, CONDÉ NAST, PPG Industries, BNY MELLON, CN, Goldman Sachs	• IT cost capture, reporting, and optimization • IT service pricing models and project financial management • Telecom Expense Management (Call Accounting/Network Visibility and Chargeback	• VP Technology • IT Director • VP IT Finance
Eclipse	Project & Work Management	Hamilton Health Sciences Foundation, VAUGHAN, London, University of Illinois Hospital & Health Sciences System, fundserv certainty, AGNESIAN, Georgia State University	• IT Project Portfolio Management • Project Management Office (PMO) • Resource Management • Project Management	• Chief Information Officer • VP of IT • VP of PMO • Director of IT • Director of PMO
RightAnswers	Enterprise Knowledge Management (KM)	Allstate, PAYCHEX, WHATABURGER, DUKE ENERGY, Coca-Cola, Dignity Health, NORDSTROM, Pfizer, LinkedIn	• Enterprise search to find answers in all repositories • Self-service portal • Out-of-the-box knowledge articles	• VP Process Excellence • Director Continuous Improvement • Black Belt/Project Manager • CIO/Director of Innovation • Chief Strategy Officer/Director of Strategy • PMO Director/VP PMO • IT Director
FileBound	Document & Workflow Automation	VANDERFIELD, St. Lucie Public Schools, Johns Creek Georgia, NEBRASKA Department of Motor Vehicles, CEDARVILLE University, DELTA DENTAL, Scoular, American	• Project Management Office (PMO) • New Product Development • IT Management • M&A Management	• VP Process Excellence • Director Continuous Improvement • Black Belt/Project Manager • CIO/Director of Innovation • Chief Strategy Officer/Director of Strategy • PMO Director/VP PMO • IT Director

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Document Lifecycle Automation

Streamline high-volume processes

Product	Solution	Who It Helps and How	Primary Industries	Key Competitors	Why We Win
FileBound	Document & Workflow Automation	Provides **IT & 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, opentext™	• Workflow capabilities • Strong partner network • Cloud offering • 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, PSIGEN software inc., EMC² CAPTIVA, KOFAX, NUANCE, Ephesoft, kwiktag	• Robust vertical-focused functionality • Scalability, supportability, integrations, customizable • HP partnership
Qvidian	RFP & Sales Proposal Automation	Enables **sales & proposal professionals** to automate the creation of RFP responses, proactive proposals, and other sales content to win more business by improving processes, productivity, and content effectiveness. Delivers intelligent workflows and improved sales effectiveness 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	rfpio, loopio, PROPOSAL SOFTWARE.COM, SEISMIC, OCTIV, Xait, OMBUD, Qorus, RFP365	• Robust functionality • Security, compliance, scalability • Expert technical, professional services, and training teams • Proven history and expertise
RO Innovation	Customer Reference & Sales Enablement	Helps **customer success, sales, & marketing personnel** create, deploy, manage, and measure customer reference and sales enablement content, turning the advocacy of satisfied customers into highly effective sales assets.	Business Services, Financial Services, Technology, Telecommunications	point of reference, influitive	• Enterprise Class Solution • More flexible and lower TCO • Technology agnostic

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Document Lifecycle Automation

Streamline high-volume processes

Product	Solution	Key Customers	Use Cases	Key Buyers
FileBound	Document & Workflow Automation	VANDERFIELD, St. Lucie Public Schools, Johns Creek Georgia, Scoular, Nebraska Department of Motor Vehicles, Delta Dental, Cedarville University, American	• Accounts Payable • Human Resources • Contract Management	• CFO, VP/Director of Finance, AP Director, Controller • VP/Director of Human Resources • VP/Director of Sales, VP/Director of Operations
AccuRoute	Secure Document Capture & Fax	Sunstein, Post Schell, Jackson Walker, TaylorWessing, Young Conaway, Shulman Rogers	• Records Scanning & Fax Consolidation • Digital Mailroom • Vendor Invoice Processing • IP or Sensitive Documents Handling • Loan Processing and Mortgage Origination • Revenue Cycle Management • Claims Processing & Prescription Routing	• CIO • VP/Director of IT • VP/Director of Information Governance • Records Manager • LOB Managers
Qvidian	RFP & Sales Proposal Automation	Citi, HSBC, Bank of America, Wells Fargo, IBM, Canon, Cisco, Citizens Bank, State Street, Morgan Stanley, Sprint, SAP, UnitedHealthcare, ING Bank, Fidelity	• RFP and RFI response automation • Security and due diligence questionnaires • Statements of work (SOWs) • Proactive proposals & presentations • Central, secure content library	• Proposal and RFP Managers • VP/Director of Sales • VP/Director of Sales Operations • VP/Director of Marketing
RO Innovation	Customer Reference & Sales Enablement	workday, vmware, DELL EMC, Nuance, jda, Ceridian, Microsoft, Finastra, Marketo	• Automate customer reference fulfillment • Centralized customer advocacy database • Send & track content engagement • Readily available assets to support buyer's journey • Centralized content library	• Customer Reference/Advocacy Managers • VP Marketing • VP Sales/Sales Ops • VP Customer Success

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Secure Document Services

Ensure data security and compliance

Product	Solution	Who It Helps and How	Primary Industries	Key Competitors	Why We Win
AccuRoute	Secure Document Capture & Fax	Empowers secure document process automation for **business 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, PSIGEN software inc., EMC CAPTIVA, KOFAX, NUANCE, Ephesoft, kwiktag	• Robust vertical-focused functionality • Scalability, supportability, integrations, customizable • HP partnership
InterFAX	Cloud Fax & Secure Document Distribution	Enables **LOB software developers 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.	Healthcare, Travel, Food Delivery, Financial Services, Retail Branch Communications and Loan Processing	RingCentral, twilio, CONCORD, eFax, myfax, FAXAGE, INNOFAX	• No equip. install (SaaS offering) • Anytime, anywhere usage • Easy configuration • Guaranteed service continuity • Secure & compliant • Alternative to on-premise fax • Extends AccuRoute capabilities
FileBound	Document & Workflow Automation	Provides **IT & 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, opentext	• Workflow capabilities • Strong partner network • Cloud offering • Implementation timeframe/ROI

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Secure Document Services

Ensure data security and compliance

Product	Solution	Key Customers	Use Cases	Key Buyers
AccuRoute	Secure Document Capture & Fax	SUNSTEIN; POST SCHELL; Jackson Walker; TaylorWessing; YOUNG CONAWAY; SHULMAN ROGERS	• Records Scanning & Fax Consolidation • Digital Mailroom • Vendor Invoice Processing • IP or Sensitive Documents Handling • Loan Processing and Mortgage Origination • Revenue Cycle Management • Claims Processing & Prescription Routing	• CIO • VP/Director of IT • VP/Director of Information Governance • Records Manager • LOB Managers
InterFAX	Cloud Fax & Secure Document Distribution	zelis; US-Rx Care; travelstart; REVLON; HEMEL; YILDIZ HOLDING; PDFfiller; DHL; Interflora; PCI Security Standards Council; ISO 27001; infoTRON; amazon; extended STAY AMERICA; OMEGA BUSINESS TRAVEL; hepsi burada; Ankara Sigorta; GDPR READY; HITRUST CSF Certified; HENRY SCHEIN	• Sending and receiving faxes • Order and delivery communications • Onboarding automation • Software to software fax communication • Integration of fax to line-of-business • Secure Fax enablement; EMR Fax • Compliant fax communication	• Software Developers • IT • CIO • VP/Director of IT • VP/ Director of Information Governance • LOB Managers
FileBound	Document & Workflow Automation	VANDERFIELD; St. Lucie PUBLIC SCHOOLS; Johns Creek GEORGIA be the exception; NEBRASKA DEPARTMENT OF MOTOR VEHICLES; CEDARVILLE UNIVERSITY; DELTA DENTAL; AMERICAN; Scoular	• Accounts Payable • Human Resources • Contract Management	• CFO, VP/Director of Finance, AP Director, Controller • VP/Director of Human Resources • VP/Director of Sales, VP/Director of Operations

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Enterprise Knowledge Management

Enable enterprise knowledge-sharing

Product	Solution	Who It Helps and How	Primary Industries	Key Competitors	Why We Win
RightAnswers	Enterprise Knowledge Management (KM)	Provides **call center & IT support teams** with a centralized cloud knowledge hub to power all customer contact channels and IT support: 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 & IT Services, Financial Services, Education	KANA. eGain mindtouch comaround	• Customer Success team • Ease of use • Enterprise scalability • Features for support and self-service • Cost savings

Product	Solution	Key Customers	Use Cases	Key Buyers
RightAnswers	Enterprise Knowledge Management (KM)	Allstate. PAYCHEX NORDSTROM WHATABURGER DUKE ENERGY. Pfizer Coca-Cola Dignity Health LinkedIn	• Enterprise search to find answers in all repositories • Self-service portal to deflect calls from contact center agents • Out-of-the-box knowledge articles for IT Help Desks within the ServiceNow environment	• Director, IT Service Management • VP/Director Customer Service • VP/Director Customer Support • Director, Knowledge Management

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