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Canaccord Genuity 39th Annual Growth Conference

August 2019

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Upland Management Team



Jack McDonald

Founder, Chairman, and CEO

+ **Serial entrepreneur,** winner of E&Y Entrepreneur of The Year™ Award
+ Led **two successful NASDAQ IPOs** (UPLD + PRFT)
+ Created **>$2BN** in shareholder / enterprise value across 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 acquisitions
+ Raised **$500MM+** in equity and debt across 4 companies

PERFICIENT · BLOCKBUSTER · Skadden



Mike Hill

CFO

+ Member of **Upland founding team**
+ **CFO of Perficient** (NASDAQ: PRFT) (2004-2007) **from $30MM to over $200MM** annual revenue run-rate
+ **Consistent value creation track record** as public company CFO
+ Executed as CFO **>30** successful technology acquisitions across 3 companies
+ Raised **$500MM+** 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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Company Overview

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Investment Highlights

Leading Enterprise Work Management Cloud for automated and integrated workflows

Attractive market opportunity driven by cloud, digital transformation, and VC investment tailwinds

Growth flywheel: Product + Operating + M&A Platforms

UplandOne operating platform provides unique and proven ability to execute and scale

High growth, high recurring revenue, high margin model

Capital and tax efficient for accretive profitable growth

Experienced management team driving value creation through prudent capital stewardship

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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

1,400+
Major Accounts
(>$115k Avg. ARR)

$220MM[1]
Annual Rev Run-rate
>92% Recurring

62%[2]
Revenue
Growth

37%[3]
Adjusted
EBITDA

98%[4]
Net
DRR

19
Consecutive
Quarters of
Meet or Beat

22
Acquisitions
to Date

>$105MM
ARR via Acquisitions
Over the Last 2 years

Source: Company information and management
(1) Based on the annualized run-rate of total revenue for the quarter ended March 31, 2019 as disclosed in the May 2, 2019 Form 8-K, plus pro-forma total revenue from the Post-Up and Kapost acquisitions, as disclosed in the April 22, 2019 and May 28, 2019 Form 8-Ks, respectively.
(2) Year-over-year recurring revenue growth for the quarter ended March, 31 2019 as disclosed in the May 2, 2019 Form 8-K.
(3) Adjusted EBITDA as a % of revenue based on the quarter ending March 31, 2019 as disclosed in the May 2, 2019 Form 8-K. See slide 24 for definition and reconciliation of Adjusted EBITDA.
(4) As disclosed in the March 7, 2019 Form 8-K and March 15, 2019 Form 10-K.

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Upland's Enterprise Work Management Cloud

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Automating and Integrating Enterprise Workflows

Value Delivered	Enterprise Cloud Solution Suites	
DRIVE REVENUE by delivering outstanding customer experiences and sales productivity	**Sales & Marketing** Customer Experience Management Enterprise Sales Enablement	
REDUCE COSTS by streamlining high-volume processes and ensuring data security and compliance	**Document Lifecycle** Document Lifecycle Automation Secure Document Services	Knowledge Management
IMPROVE PRODUCTIVITY by transforming services delivery and convert cost centers into value drivers	**Project & IT Management** Professional Services Automation Project and Financial Management	

Cloud-Based Workflow Automation with **Deep Functional Solutions**

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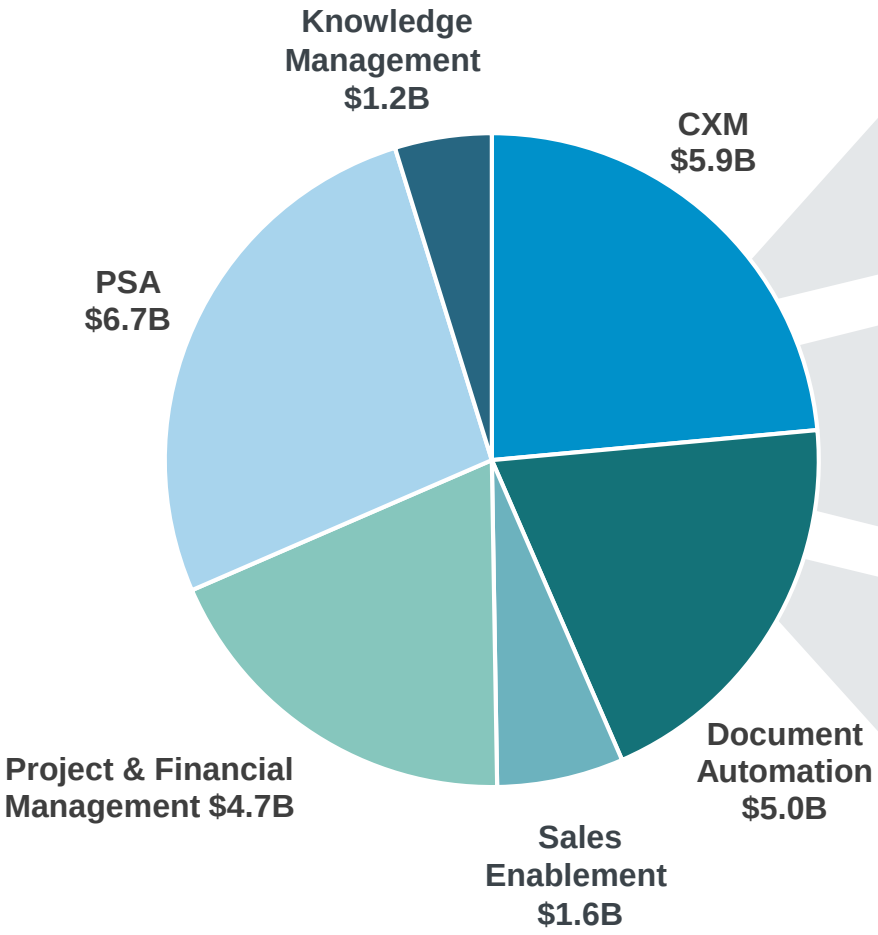
$25B+ Market Driven by Secular Tailwinds



1 Digital Transformation

Need for automated solutions that are **scalable** and **integrated**, versus siloed and manual

2 Transition to Cloud

Still early innings in the **digital transformation** of the **enterprise**, driving productivity across every department

3 Wave of VC Investment

VCs investing **tens of billions of dollars annually in Cloud**, creating a **healthy pipeline of targets for Upland**

Sources: Gartner Magic Quadrant for Cloud-Based IT Project and Portfolio Management Services; Grand View Research Professional Service Automation (PSA) Software Market Size & Analysis; Apptio S-1; WinterGreen Research Business Process Management (BPM) Cloud, Mobile, and Patterns; Research & Markets Global Knowledge Management Market Analysis, Size, Share, Growth, Trends & Forecast; Markets & Markets Customer Experience Management Market Global Forecast; Aragon Research Sales Engagement Platform Forecast; Arizton Advisory & Intelligence Online Fax Market Global Outlook and Forecast 2017–2022.

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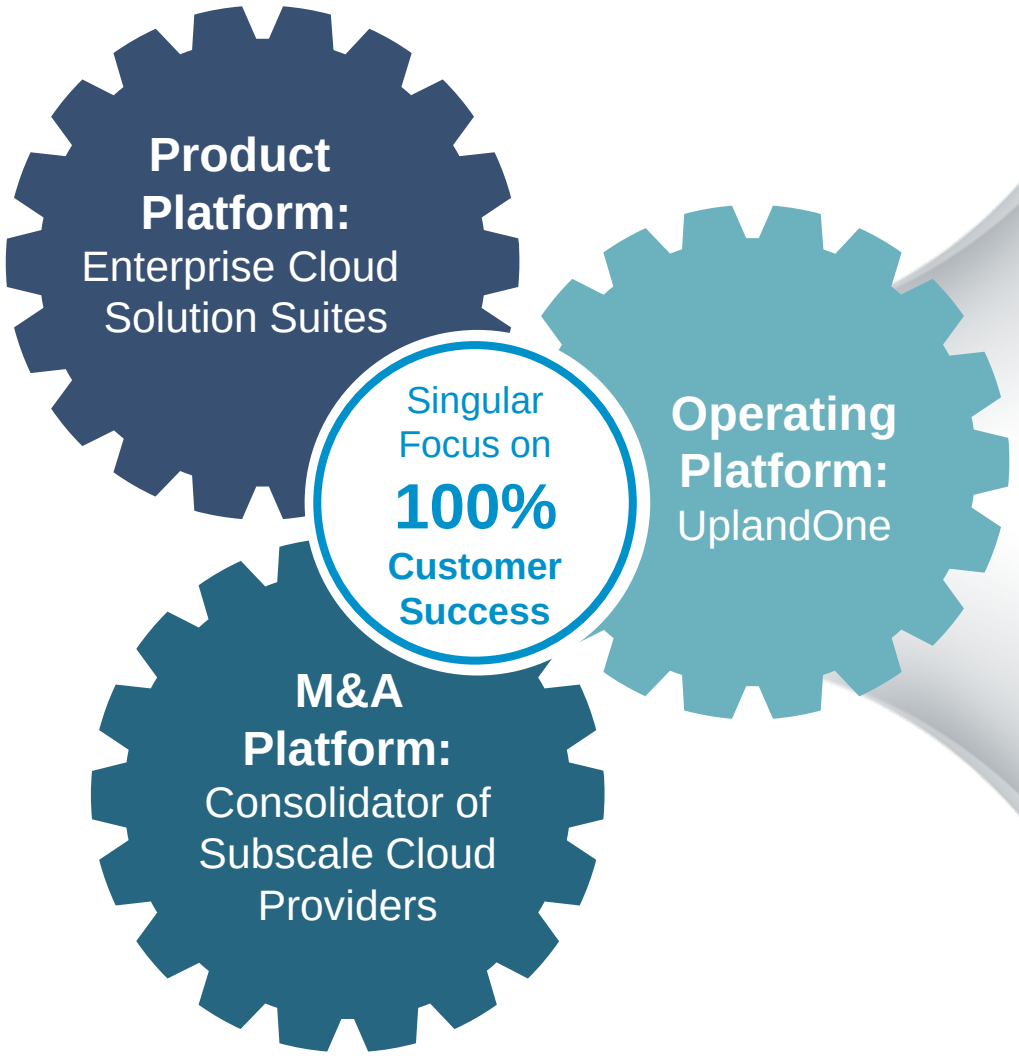
3 Key Drivers of the Upland Growth Flywheel



- ü **Acquire thematic, proven cloud products with blue chip customers at highly accretive multiples**
- ü **Professionalize operations via transformation playbook, increase margins + customer satisfaction**
- ü **Drive expansion revenue across our 9,000+ customers through growing enterprise salesforce**

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UplandOne = A Better Way to Run a Software Business

1. **100% Customer Success Culture**
   Proven, programmatic, efficient customer outreach and account management
2. **Enterprise Grade Delivery**
   Global 24/7 customer support + PSO + AWS
3. **Analytics and Automation**
   Hyper-efficient and responsive R&D
4. **Customer-Driven Product Innovation**
   Customer needs guiding both R&D and M&A initiatives
5. **Outsourcing and Offshoring**
   Tap global labor markets, staff with stars at fraction of price

Satisfied Customers

98% *Net Dollar Retention Rate*[(1)]

Higher Margins

37% *Adjusted EBITDA margin*[(2)]

Unique Ability to Execute and Scale

(1) As disclosed in the March 7, 2019 Form 8-K and March 15, 2019 Form 10-K.
(2) Adjusted EBITDA as a % of revenue based on the quarter ending March 31, 2019 as disclosed in the May 2, 2019 Form 8-K. See slide 24 for definition and reconciliation of Adjusted EBITDA.

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Upland's Unified Product Platform

ü **Integrated Platform** ü **Seamless Experience** ü **Deep Functionality** ü **Enterprise-Grade**

Common UI/UX

Single Sign On (SSO)

Upland Analytics

Upland Mobile

Upland Work Center (Q4'19)



- 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

Enterprise-Grade Cloud Platform

LinkedIn · Marketo · ORACLE · salesforce · infor · SAP · Microsoft Dynamics · CONCUR · ADP

Key Third-Party Applications

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Upland's M&A Platform: Target Screening Objectives



Goals and Track Record

+ Innovate through acquisition
+ Add $25-$50MM revenue run-rate per year
+ Strong reputation / pipeline
+ CEO has done 42 successful tech acquisitions in 20 years
+ 22 acquisitions to date @ 0.9x-3.3x revs



Strategic Fit

+ Cloud-native
+ Build out solution suites
+ Solutions our existing customers want
+ Add to our Fortune 2000 and major mid-size customer base
+ US, Canada, EMEA



Financial Fit

+ $5-25MM Revenue
+ Sticky, with 90%+ NDRR
+ 70%+ Gross Margins
+ 10-15% Organic Growth
+ Average ARR per Major Account > $25K
+ 5-8x Pro Forma Adj. EBITDA(1)

Source: Company information and management
(1) See slide 24 for definition and reconciliation of Adjusted EBITDA

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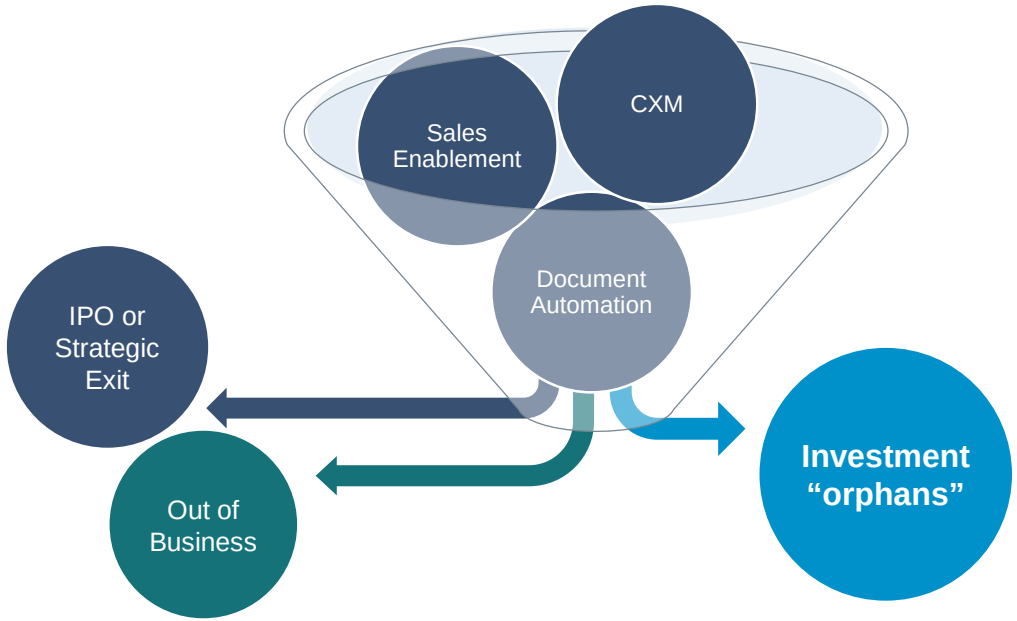
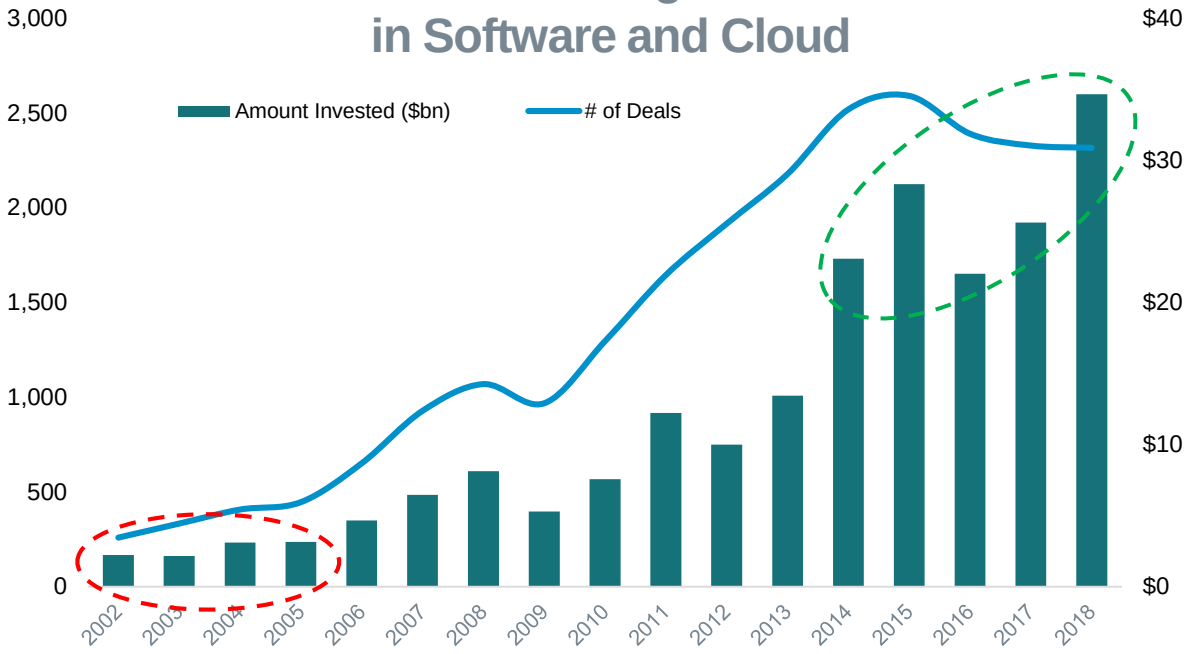
Upland's M&A Platform: Market Opportunity

Targeting "Orphaned" VC Investments



Massive and Growing VC Investment in Software and Cloud



Targeting a ***large pool of VC Cloud investments***: businesses with a proven product / market, but in need of a platform

Evergreen opportunity from continued VC Cloud investments

Growing pool of targets with ***$210 billion invested by VCs*** since 2002(1)

Majority of VC investments in Cloud have come in the ***last 5 years***

(1) PwC/CBInsights MoneyTree™ data for Q1 2002 to Q4 2018, filtered by Sector (Software and Internet) and Stage (Seed, Early, Expansion, Later Stage, or Other).

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Diversified Base of 9,000+ Customers

Building lasting and

strategic relationships

with customers

1,400+

accounts

$>115K ARR

80%+

revenue from major accounts

Financial Services



Government, Nonprofit, Education



Technology



Media



Manufacturing, Industrial



Corporate Services



Healthcare



Consumer, Restaurant, Retail



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UplandOne Driving Penetration in Strategic Accounts

Large European IT Services Corporation

Enterprise Sales Enablement Suite

Problem:

- Low win-rate and lengthy response times for RFPs
- Lack of brand consistency and wasted time locating RFP answers

Upland's solutions:

- Automate workflows and create brand-compliant RFP packages
- Provide intelligent answer recommendations and create a central repository

Results:

- Reduced proposal response times and improved win-rates
- Increased brand compliance and content quality
- Improved productivity and increased accuracy of responses

Key metrics

Grew from **~100** licenses in EMEA (2017) to **>750** across US / APAC

Starting ARR (2017):	Current ARR (2018):	Expansion CAGR:
$26K	**$200K**	**+652%**

Large Medical Device Manufacturer

Project and Financial Management Suite

Problem:

- Lack of cost control and project visibility in IT project management office
- Limited alignment between projects and overall strategic objectives

Upland's solutions:

- Accurately track details (costs, consumption, usage, etc.) of IT projects
- Create a centralized framework for demand management, resource optimization, project delivery, and financial oversight

Results:

- Full financial visibility across IT organization
- Deeper insight and better analytics into project performance
- Improved project success and ROI for IT investments

Key metrics

Expanded to **>4,000** users for all IT project & resource planning since 2014

Starting ARR (2014):	Current ARR (2018):	Expansion CAGR:
$55K	**$724K**	**+77%**

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Experienced Management Team with Track Record of Successful Execution



Jack McDonald
Founder, Chairman & CEO

+ Leads overall strategic direction, acquisition, integration, and growth strategies



Tim Mattox
President & COO

+ Leads sales, marketing, development, operations, human resources, and product areas



Mike Hill
CFO

+ Leads Upland's finance & corporate development organizations



Sean Nathaniel
EVP & CTO

+ Oversees Workflow Automation products and translates product vision into cloud applications



Mounir Hilal
EVP & Chief Customer Officer

+ Oversees Project & IT Management products and responsible for Customer Success Program



Jed Alpert
EVP & General Manager

+ Oversees CXM solutions and translates strategy and vision into marketing communications



Kevin Sequeira
SVP of Product Management

+ Leads product management team and responsible for delivering customer-driven innovation across product lines



Kin Gill
SVP, General Counsel & Secretary

+ Oversees worldwide legal affairs and implementation of overall legal strategy



Ian Burk
SVP of Integration

+ Leads integration operations and acts as transitional GM for acquired companies



Paul Miller
SVP & CMO

+ Leads core operational functions, including sales operations, business operations, and marketing



Rochelle Delley
VP of Security and Compliance

+ Leads Upland's global security and compliance policies and programs



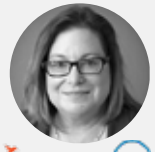
Austin Woody
VP of M&A and Corporate Development

+ Leads Upland's acquisitions and corporate development team



Dominic Aelberry
VP of EMEA

+ Lead Upland's sales, customer success, and services outside of the North America



Amber Bennett
VP of Finance

+ Leads Upland's strategic and financial planning organization



Jen Verzal
VP of Human Resources

+ Leads Human Resources and responsible for building a culture of smart, positive, and creative people

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Financial Overview

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Financial Highlights

Capital Stewardship + Value Creation

- ü **41% revenue growth CAGR** (‘16A-’19E)[(1)] over $200MM scale
- ü **>92% recurring revenue**, growing 62% last year
- ü **98% net dollar retention rate**[(2)]
- ü **37% Adjusted EBITDA margin**[(3)] and growing (target 40% at scale)
- ü **High adjusted FCF conversion:** capital and tax efficient
- ü **Met or beat guidance every quarter since IPO** (19 consecutive quarters)

(1) Based on the midpoint of our guidance range for the year ended December 31, 2019 as disclosed in the May 28, 2019 Form 8-K.
(2) As disclosed in the March 7, 2019 Form 8-K and March 15, 2019 Form 10-K.
(3) Adjusted EBITDA as a % of revenue based on the quarter ending March 31, 2019 as disclosed in the May 2, 2019 Form 8-K. See slide 24 for definition and reconciliation of Adjusted EBITDA.

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Stages of Upland's Evolution

1



M&A for Critical Mass

2



Standardized UplandOne Operating Platform

3



Margin Expansion

4



Continued Accretive M&A Growth

+

Organic Growth

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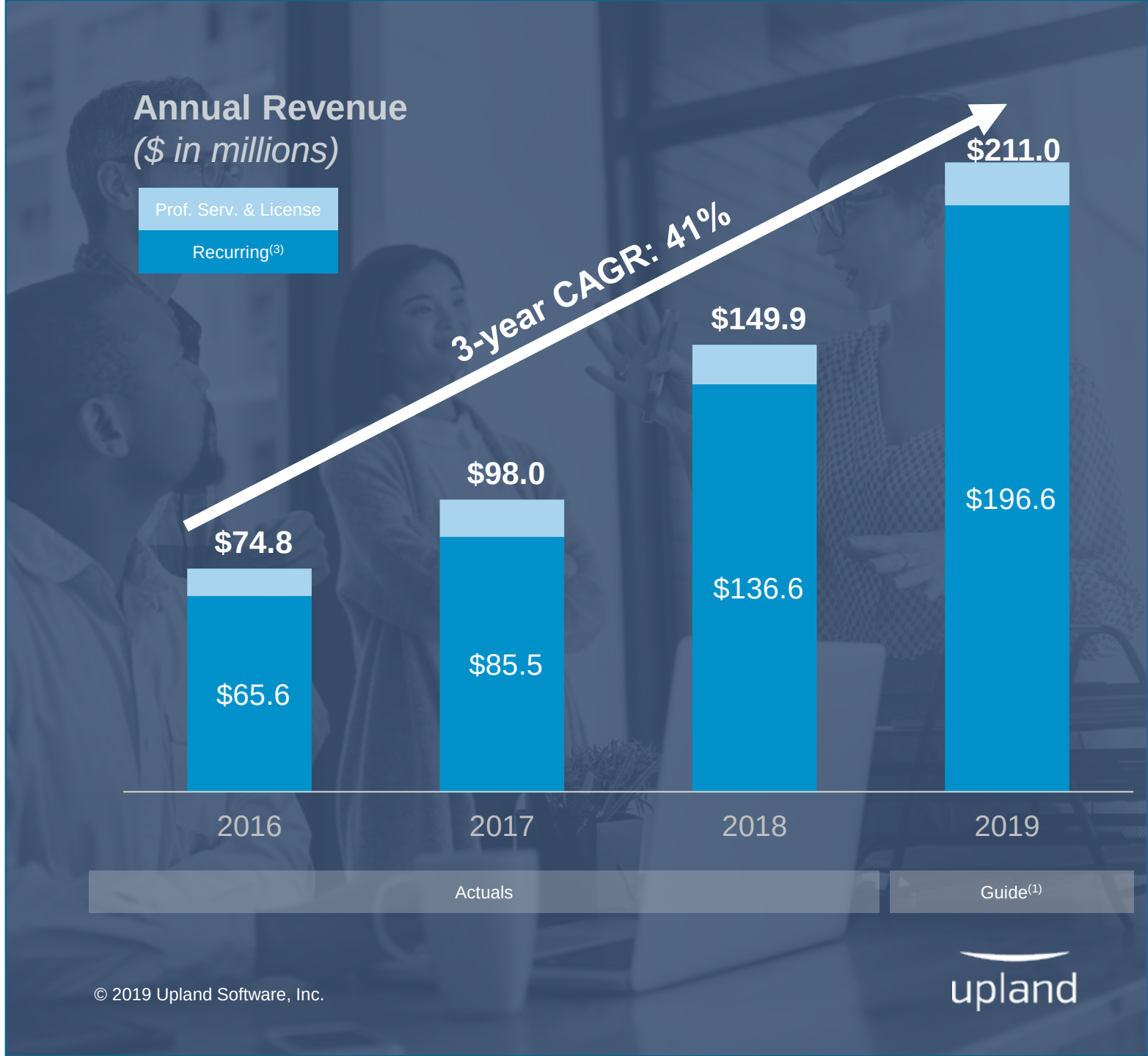
Annual Revenue Growth Trend

Growth Drivers

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



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 May 28, 2019 Form 8-K.
(2) As disclosed in the March 7, 2019 Form 8-K and March 15, 2019 Form 10-K.
(3) Recurring revenue is also known as Subscription and Support revenue.

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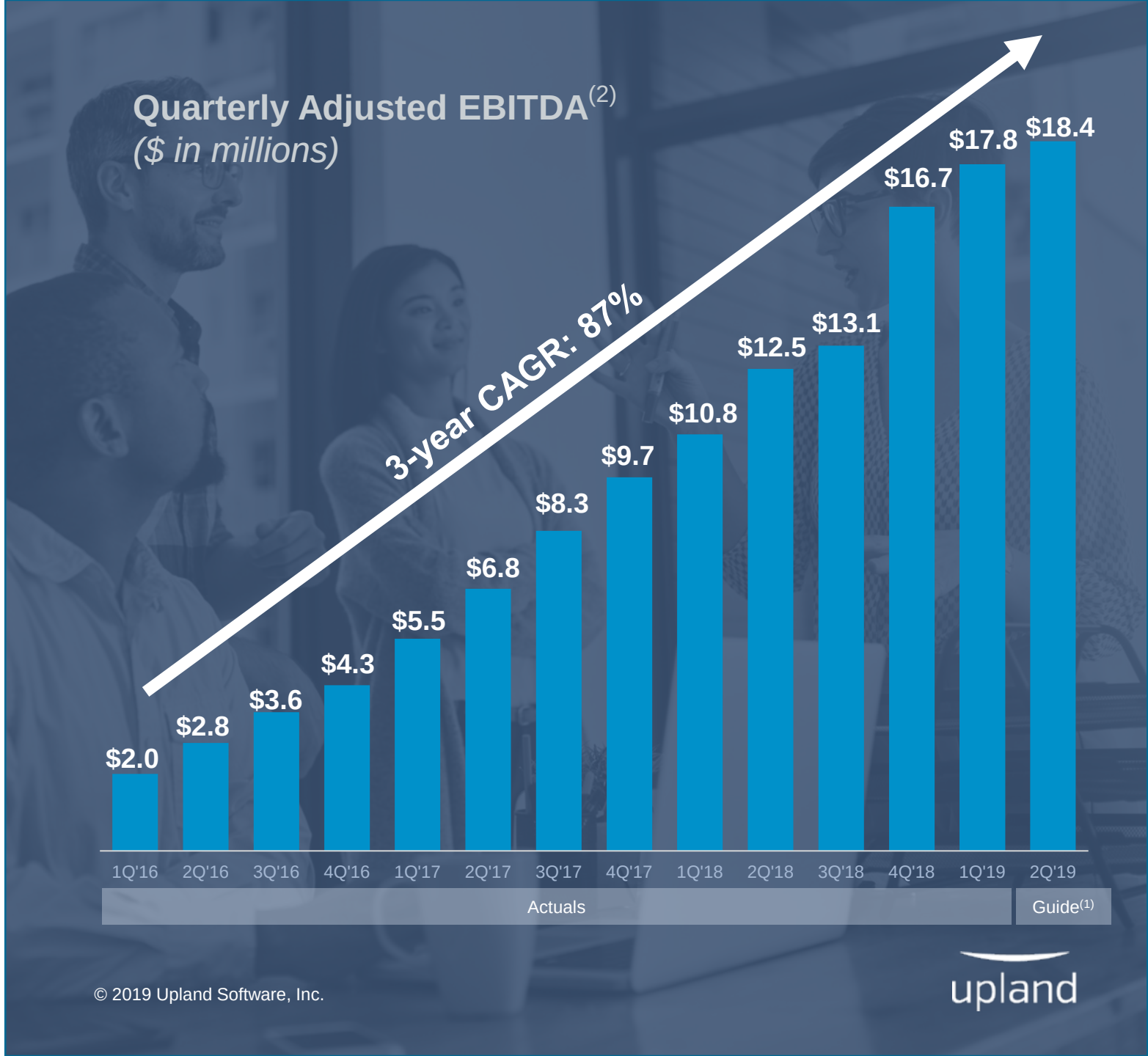
Adjusted EBITDA Growth Trend

Consistent Margin Expansion

+ Driven by UplandOne operating platform and scale efficiencies

+ Adjusted EBITDA[(2)] expansion from 3% at IPO to 37% today[(3)]

+ Increased Adj. EBITDA[(2)] margins by 744 bps (past 8 quarters) while doubling Sales HC



Source: Company information and management

(1) Based on the midpoint of our guidance range for the quarter ended June 30, 2019 as disclosed in the May 28, 2019 Form 8-K.
(2) See slide 24 for definition and reconciliation of Adjusted EBITDA.
(3) Adjusted EBITDA as a % of revenue based on the quarter ending March 31, 2019 as disclosed in the May 2, 2019 Form 8-K. See slide 24 for definition and reconciliation of Adjusted EBITDA.

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Investment Highlights

- **Leading Enterprise Work Management Cloud for automated and integrated workflows**
- **Attractive market opportunity driven by cloud, digital transformation, and VC investment tailwinds**
- **Growth flywheel: Product + Operating + M&A Platforms**
- **UplandOne operating platform provides unique and proven ability to execute and scale**
- **High growth, high recurring revenue, high margin model**
- **Capital and tax efficient for accretive profitable growth**
- **Experienced management team driving value creation through prudent capital stewardship**

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Appendix

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Adjusted EBITDA Reconciliation to Net Income (Loss)

(in Millions)

	1Q'16	2Q'16	2Q'16	4Q'16	1Q'17	2Q'17	3Q'17	4Q'17	1Q'18	2Q'18	3Q'18	4Q'18	1Q'19
Net Income (Loss)	$(5.6)	$(3.6)	$(2.4)	$(2.0)	$(5.6)	$(5.8)	$(3.5)	$(3.8)	$(3.2)	$(5.2)	$(4.2)	$1.8	$(7.8)
Depreciation and amortization expense	2.5	2.6	2.4	2.3	2.4	2.6	3.1	3.8	4.2	5.0	5.4	6.7	7.4
Interest expense, net	0.6	0.7	0.7	0.8	0.9	1.2	2.3	2.2	2.5	3.1	3.1	4.5	5.1
Other expense (income), net	0.7	0.3	0.1	(0.4)	0.1	0.0	0.1	(0.5)	(0.3)	0.5	0.7	0.8	0.8
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	0.9	0.7	(11.9)	(0.6)
Stock-based compensation expense	0.7	0.9	1.1	1.7	2.3	3.6	1.9	2.2	2.6	4.0	3.8	3.8	4.6
Acquisition-related expense	2.4	1.4	1.0	0.7	3.7	2.3	4.3	4.7	3.1	3.1	2.5	10.0	7.7
Purchase accounting deferred revenue discount	0.5	0.4	0.3	0.2	0.7	1.1	1.3	1.4	1.4	1.1	1.1	1.0	0.6
Adjusted EBITDA	**$2.0**	**$2.8**	**$3.6**	**$4.3**	**$5.5**	**$6.8**	**$8.3**	**$9.7**	**$10.8**	**$12.5**	**$13.1**	**$16.7**	**$17.8**

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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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

APR 2019 **Post-Up**
Email Marketing Automation & Analytics

MAY 2019 **Kapost**
Content Operations Platform

Over the past 2 years, Upland has added >$105mm in ARR through disciplined acquisitions

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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	• 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	• 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
PostUp	Email and Audience Development	Provides **publishing & media brands** with world class strategic services that drive business outcomes, a platform for email audience growth, collection and analysis of first party data, and email automation.	Publishing & Media	SAILTHRU, bouncex, salesforce marketing cloud	• Deep understanding of publishing and media business models, pain points • Audience development aligns with client goals • Core platform optimized for publishers • Integrates with existing client technology
Kapost	Content Operations for Sales & Marketing	Unites **revenue teams** to speak in one voice across the customer journey by streamlining the content development process at scale. Provides advanced end-to-end content operations, orchestrating all stages of content planning, production, and distribution and ensures the delivery of strategic messaging in a consistent, yet personalized manner.	Technology, Manufacturing, Healthcare, Financial Services	NewsCred, sprinklr, opal, scribble LIVE, Contently	• Robust editorial planning & governance capabilities • Advanced content performance analytics • Built-in integrations • Pre-built creation and distribution templates

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
PostUp	Email and Audience Development		• Maximize email audience • Market digital subscriptions • Create custom workflows for newsletter editors • Leverage Google Analytics for use-cases • Support audience monetization • Send email at very large scale	• Chief Digital Officer • VP Revenue • VP Audience Development • VP Operations
Kapost	Content Operations for Sales & Marketing		• Content management lifecycle • Orchestrate aligned content production across all business units & target segments • Coherent customer journey • Single system of record to manage all content	• CMO/VP of Marketing • Director of Marketing Ops • VP of Systems/Technology • Director of Content

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
Kapost	Content Operations for Sales & Marketing	Unites **revenue teams** to speak in one voice across the customer journey by streamlining the content development process at scale. Provides advanced end-to-end content operations, orchestrating all stages of content planning, production, and distribution and ensures the delivery of strategic messaging in a consistent, yet personalized manner.	Technology, Manufacturing, Healthcare, Financial Services	NewsCred, sprinklr, opal, scribble LIVE, Contently	• Robust editorial planning & governance capabilities • Advanced content performance analytics • Built-in integrations • Pre-built creation and distribution templates
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

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
Kapost	Content Operations for Sales & Marketing	ciena, Greenway Health, Lenovo, LogRhythm, Rosetta Stone, DATAWATCH, datAvail, SYNOPSYS, PHUNWARE, randstad, IBM Analytics	• Content management lifecycle • Orchestrate aligned content production across all business units & target segments • Coherent customer journey • Single system of record to manage all content	• CMO/VP of Marketing • Director of Marketing Ops • VP of Systems/Technology • Director of Content
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, VOLKSWAGEN FINANCIAL SERVICES, easyJet, extraenergy, HomeServe, CAPITA, Premier Inn, 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

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, Qorus, OMBUD, 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, ESTĒE 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, Whataburger, Duke Energy, Coca-Cola, PAYCHEX, Dignity Health, NORDSTROM, Pfizer, 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, RBS, MARKS & SPENCER, VOLKSWAGEN FINANCIAL SERVICES, easyJet, extraenergy, HomeServe, CAPITA, TOYOTA, Dunelm, CALOR, BARCLAYS, BOC	• 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, 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, Johns Creek GEORGIA, NEBRASKA, CEDARVILLE UNIVERSITY, St. Lucie PUBLIC SCHOOLS, DELTA DENTAL, AMERICAN, Scoular	• 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, Nebraska Department of Motor Vehicles, Cedarville University, Delta Dental, American Equity, 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
AccuRoute	Secure Document Capture & Fax	Sunstein Kann Murphy & Timbers LLP, 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, 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	• 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, 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; OMEGA BUSINESS TRAVEL; hepsi burada; Ankara Sigorta; GDPR READY; infoTRON; amazon; extended STAY AMERICA; 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; NEBRASKA; CEDARVILLE UNIVERSITY; DELTA DENTAL; AMERICAN EQUITY; 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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