



Salestrakr⁵

An Overview

The amount of information business professionals have to track about their clients, prospects and co-workers is growing dramatically. Multiple phone numbers, multiple email addresses, instant messaging IDs, web pages, second homes, spouses, kids, hobbies, organizations and on and on. Not to mention sales opportunities, phone calls, emails and account status notes. This mountain of data can no longer be maintained in a simple contact manager. Nor do the existing software applications provide simple and cost effective customer relationship management (CRM) capabilities.



The solution is Salestrakr – a full featured, easy to use, and inexpensive web-based CRM application. Salestrakr is complete and was released into full production in May of 2008. The company, also named Salestrakr, has grown strictly through word of mouth and has been completely funded and built by the founders of the company.

Salestrakr is targeted at owners and sales teams at small to medium size businesses. It is also targeted at those organizations that utilize agents as extensions of their sales teams. Whether salespeople are inside or outside of a company, organizing teams and keeping a complete history of customer and prospect interactions is critical. Salestrakr provides an environment that keeps even the most independent of sales teams working closely with sales management.

The founders at Salestrakr strive to deliver the most functional, easiest to use and most technically modern CRM all at an extremely affordable price.

The Product

Salestrakr can be accessed from any browser. It allows for the storage of all detailed information about contacts and their families. Users can track the hobbies and interests of their contacts. They can also schedule meetings, assign tasks, attach files and keep a complete history of everything they have done with a contact.

Salestrakr also allows users to group contacts into an account showing a complete aggregation of the activities of those contacts on one page.

Contacts and accounts can either be shared fostering a team concept or they can be viewed based on the hierarchy of the organization allowing sales people and agents to keep their information private.

Salestrakr also provides complete sales opportunity tracking and supports automated generation of new opportunities from other sources such as websites and applications.

In addition to full web access, there is also a **real-time** mobile phone interface. It works with any web-enabled phone. Users can get all of their contacts and calendar items quickly when not at their PC. Mobile Salestrakr is optimized for limited graphics and bandwidth making it work well with any standard mobile data network.

Salestrakr offers and continues to expand an application programming interface (API) so that outside applications, databases and web services can be linked with Salestrakr.

Good Foundation

Salestrakr is a “work in place” CRM. The combination of Javascript and “AJAX” techniques provide a faster, simpler web experience for Salestrakr users. In many instances, Salestrakr users ask if they are working offline. They don’t experience what



many many using web-based CRM applications experience, the dreaded “click and wait.”

Salestrakr is built on Linux, Apache, MySQL and PHP, tools that are proven and allow the founders to quickly change and update the product. It is a truly disruptive technology. It took a large team of developers several years to create the latest version of ACT!. Salestrakr was created by two people in less than one year.



▼ My Tasks

You have 11 current and overdue tasks. Only current and overdue tasks are shown.

| Close Contacts | Task | When |
|------------------|---|----------|
| Christy McCarthy | Schedule a account review | 10/07/08 |
| Ruth Nordland | Call-to-get details on the order | 10/07/08 |
| Carl Lefevre | Send a Birthday card | 09/19/08 |
| Phillip Wilms | Check on the status of the repair | 09/16/08 |
| Wolfgang Ingram | Cancel the meeting | 09/16/08 |
| Allan Parton | Add to the LLI group | 09/16/08 |
| Cathy Parker | Order flowers | 10/03/08 |
| Thomas Faurett | Send a card with congratulations | 10/05/08 |
| Sara Blackwell | Schedule a round of golf | 10/06/08 |
| Brenda Benanno | Send an email with all the photos | 10/07/08 |
| Brenda Lenzien | Make lunch arrangements | 10/07/08 |
| Alice Stonina | See if they will accept the old revision | 10/07/08 |
| Susan Moppins | Offer the special pricing for annual commitment | 10/07/08 |
| Thomas Bledsoe | Confirm the appointment | 10/07/08 |

Legend: ■ Urgent ■ Overdue ■ Completed Today

Salestrakr delivers a large number of modern Web features not yet found in more complex products. These include tag clouds, RSS feeds, a contact browser, rapid form customization and deep search capability.

Salestrakr is a business productivity application, and is designed to solve real world problems, increase customer success and become an integral part of businesses person’s life.

Key Features

SaaS - Salestrakr is completely hosted and considered “Software as a Service” or SaaS. No special software is required to use Salestrakr. Just a browser and an Internet connection.

Speed - Salestrakr is extremely fast. Its architecture is based around high quality and well known open source software modules including Linux, Apache, MySQL and PHP (making Salestrakr a LAMP application.) It also provides a user interface completely designed around Javascript and AJAX development methods. The use of Javascript and XML in the browser allows for tremendous efficiencies in bandwidth usage and as well an enhanced user experience.





Sales Management - Salestrakr provides an easy yet powerful sales opportunity management environment. Pipeline stages can be customized as can sales reports. Salestrakr can even alert a sales manager when an opportunity has been advanced to a new stage in the pipeline allowing that manager to know what's happening as it happens.

Email - Salestrakr supports both outbound and inbound email. It also saves attachments associated with inbound email. Don't want to use Salestrakr's email client? You can use your own email client, forwarding email to your Salestrakr dropbox to update contact activity.

Search - Salestrakr delivers many ways to find people, accounts and their associated histories. You can type contact or company names right in the Active Search box and those names or their histories begin to appear. No need to wait for a page to refresh. Or, you can perform an advanced search, searching for items in specific fields and using the output to produce a list, a report or even a group email. If you just want to find a list of people based on a keyword, you can click on a word in your "Tag Cloud" and immediately find those people who are so tagged.



Communications - If salespeople or agents use Skype to communicate, a click on a phone number or Skype ID in Salestrakr will open Skype on their computer and start the call (this does require Skype credit or a Skype subscription if dialing a phone number.)

Marketing Automation - Salestrakr rules can be created that perform tasks while salesperson are busy selling. For example, if a sales opportunity stays in a pipeline stage for a certain number of days, Salestrakr can be told to automatically send out an email to the contact associated with the opportunity. Or a task can be automatically created to encourage action on the opportunity. Or a simple notification can be sent to the account or contact owner.

Key Differentiators

Easy To Use - Other CRM applications have very hierarchical databases. While that can be good for certain applications, it also forces changes to the user interface that are not so good. Salestrakr has a very flat database. However, it achieves and in many cases exceeds the power of other CRM applications through the power of PHP and AJAX in development and display. For example, some CRM applications require that you first create an account before you create and assign a contact. Not with Salestrakr. Salestrakr allows a salesperson to create a record with what they know and need. If they desire to link a contact with an account, they can go to that account and use the embedded Active Search box found directly on the account page to create a link.

Low Cost - Salestrakr is built around open source components including Linux, Apache, MySQL and PHP. Further, the Salestrakr user interface is AJAX-based and borrows many of its capabilities from readily available open source code. Salestrakr also makes use of modern hosting facilities including those from Amazon to achieve a very low cost of operation. Salestrakr is also completely built and maintained by the Salestrakr founders in Atlanta with limited overhead and extremely efficient engineering and design.

Even more, the company was completely funded by its founders and thus has no burdens such as heavy debt or expensive venture capital. All of these enable the company to price competitively right from the beginning and further to adapt to new customer requirements quickly.

All of these and more allow Salestrakr to be offered at \$99 per user per year. The right price for small businesses in any economic condition.

Edit In Place - Almost all items on a Salestrakr contact business card are editable right on the screen. Just click on the data to change and you're in the edit box. This approach keeps a salesperson in as few pages and fields as possible and allows them to get back to what they do best, selling!

Security - Built-in to Salestrakr, at no additional charge, are two key security differentiators. First is 2-factor authentication. Considered a premium service by other CRMs, this feature is standard in Salestrakr. Further, Salestrakr supports SMS and/or email for sending out a 2nd password. AND, it supports either dictionary passwords (simple or randomly concatenated) or "strong" passwords. Currently, SMS delivery is available only in the U.S.



Also standard is an industry first: Browser-based encryption. Salestrakr uses the Tiny Encryption Algorithm to encrypt data allowing users to adhere to any requirements they may have to protect such information as dates of birth or social security numbers (tax IDs). Encryption is an option upon request and not automatically available.

API - Salestrakr has built an API to simplify the integration of outside data sources and applications. That API is today used solely by the Salestrakr team. However, the company is expanding its capabilities and will soon launch it as a resource to all Salestrakr customers. The Salestrakr API is REST-based.

Key Benefits

Simplicity - Salestrakr is an easy to use application. It keeps most activities on just one page and doesn't require lots of browser-to-server page refreshes.

Automation - Salestrakr helps salespeople do things while they are on the road, selling, or at home with their family. Marketing automation functions inside of Salestrakr ensure sales teams are always in touch with customers.

Cost - Salestrakr is inexpensive. \$99 per user per year. And the Salestrakr team can deliver professional services at a fraction of the cost quoted by other CRM vendors. Salestrakr is about customer satisfaction and success. Not about IPOs.

Technology - Salestrakr is built around proven, stable technology. As with many products today, Salestrakr has created it's own intellectual property and combined it with world-class open source resulting in the best CRM application available at an unbeatable price.

Company - Working with Salestrakr, the company, is easier than with most technology companies. There is no large PBX to get lost in when you have problems. There no complex ownership structure. Salestrakr's focus is on it's customers and considers each customer important. So much so that the founders also provide support when customers need help.



The Company's Business Model

The founders started the build of the code base in early 2007 planning to target the financial service industry. The concept was tested in late 2007 with some good results. The company did win new customers, one of which is a firm with 500+ agents. However, the founders decided to expand product capabilities and relaunch as Salestrakr in January of 2008.

The company makes money in 2 straight-forward ways. First, it sells subscriptions to Salestrakr as a service (SaaS). Second, it provides implementation services to enable customers to “go live” with Salestrakr. These services include custom implementation, training, data importation and back-end integration. Standard Salestrakr subscriptions are for 1 year. For larger customers, Salestrakr will bill on a monthly basis. The company charges \$99 per user per year. This price includes the service itself and on-going support.

Unlike many other CRM software companies, the company has and will continue to build custom CRM implementations that have the look and feel (branding) of our customers with limited or no Salestrakr attribution.

The company's plan is simple. Keep costs low, prices low, service high, security high and technology state-of-the-art. This approach has allowed the company to grow in a very manageable way without a large marketing budget nor an expanded sales team.

The company targets those prospects that have larger independent sales teams who either can't afford expensive CRM software or have no need for the difficult operation that comes with it. The company also looks to markets outside the U.S. that have the same characteristics as just mentioned and may also be price sensitive.

Going forward, the company will continue this approach, reaching first time CRM users and as well those that have a need to save money and time.

Profit and Longevity

In a rough economic time, the company has devised a structure that can make money and grow without many of the tools required of most young technology companies.

- The company is profitable.
- The company has no venture capital or angel investments.
- The company has utilized open source including Linux, Apache, MySQL and PHP.
- The company is a member of Atlanta's Advanced Technology Development Center or ATDC (part of Georgia Tech) which provides, at no charge, mentoring, resources and market visibility.
- The company has an advisory board who are themselves successful entrepreneurs.
- The company uses the latest in hosting technologies and services.

The Founders

The founders and sole owners of Salestrakr are **Steve Youngblood** and **Paul Freet**. Steve and Paul founded the company with their own capital and have been it's sole source of ongoing investment. They were intent on rapid profitability and investment back into the company. By using no venture capital and using open source where possible, the company has been stable and profitable since it's inception.

Steve is the company's CEO. Steve has a Bachelor of Science in Business Administration from the University of Florida and a Master of Business Administration from the University of North Carolina at Charlotte. From 1991 to 1995, Steve established and ran product management for Atlanta's S2 Systems. He then went to Atlanta's Harbinger Corporation in 1995 where he built and launched the company's new Internet-based EDI products and then moved into the companies new international operations group. In 2000, Steve launched international operations for San Francisco-based Epicentric and has since founded Atlanta-based Motionspeak and now Salestrakr. Steve serves as an advisor to Atlanta-based Global Crypto.

Paul is the company's Chief Software Architect and hatched both the idea and the original code base for Salestrakr in 2007. Paul has a Bachelor of Science in Electrical Engineering and a Certificate in Computer Engineering from the Georgia Institute of Technology (Georgia Tech). From 1996 to 2000, Paul was the chief technology officer of San Diego-based TruSOLUTIONS, a Linux server company. The company was sold to VA Linux for \$200M. In 2000, Paul founded Atlanta-based Racemi, an early pioneer in blade servers and now a data center virtualization software company. Paul began his career with both Fairchild Semiconductor and Hitachi. Paul currently serves as a Venture Catalyst with Georgia Tech's ATDC.

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