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July 21, 2017

**RFP SUBMISSION FROM
VIRTUAL CAUSEWAY**

Agenda

- Introductions
- About Virtual Causeway
- Event Services
- Our Team
- Systems and Reporting
- Data Exchange
- Proposal
- Q&A
- Next Steps

Presenter

Before co-founding Virtual Causeway in 2001, Bill served as Director of Sales for Financial Insights (an IDC company), where he focused on restructuring the sales team and new Channel Development after the acquisition of Meridien Research. He was also responsible for establishing Strategic Accounts (Microsoft, E*Trade Financial, Oracle, Intuit, NEC, WIPRO, etc.) in both North America and Asia.

Prior to Bill's role at Financial Insights, he was Managing Director of Channel Sales at Financial Fusion (a Sybase company) where he was responsible for key Strategic Alliances and Channel Development after the acquisition of Home Financial Network. Before being integrated into Financial Fusion from Sybase, he held several management positions, including Sales and Channel Management as well as Telesales Management – managing Sybase's North American Call Center which included 4 geographic locations.

Bill holds an MBA in Global Finance and Marketing from Clark University (Worcester, Massachusetts) and a BA in Economics (with a concentration in Management) from St. Olaf College (Northfield, Minnesota). He migrated from MN to MA in 1990 to complete his MBA and has been living in MA ever since. Bill is married, has 3 sons and a daughter and enjoys spending time with his family.



Bill Clark

Co-Founder and EVP of Sales and Business Development

bill@v-causeway.com

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Presenter

Part of the Virtual Causeway leadership team since 2006.

Client Services Project Manager with over 20 years of client management, project management, demand creation and sales and marketing experience.

After attending Robertson College in Winnipeg, on a full scholarship, Marlene graduated with a Business Administration Diploma in 1992. She has taken additional courses at Wilfred Laurier University in Psychology and Statistics and The University of Western Ontario in Leadership. Marlene has taken additional training in SiriusDecisions, Sales Management, Six Star Customer Satisfaction, Consultative Selling, Improving Employee Training plus Successful Advertising and Marketing Techniques.

Marlene and her husband also enjoy work together on their rental property business. Marlene enjoys spending time with their energetic golden retriever, Penny. Her hobbies are biking, hiking, scrambling, scrapbooking and Egyptian art.



Marlene Keay

Senior Manager, Business Development

marlenek@v-causeway.com



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WHO IS VIRTUAL CAUSEWAY?

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Virtual Causeway Manages the Entire Demand Waterfall

Fast Facts

- **Founded 2001**
- **Offices in Waterloo, Ottawa and Boston**
- **Three times awarded one of Canada's fastest growing companies by Profit 100**
- **Generated over 1 million leads**
- **Website www.v-causeway.com**




Our Virtual Demand Center Combines **Digital Marketing Specialists** with **Outbound Teleprospecting Experts** and **Data/Technology Integrators**.

Infrastructure	Marketing	Sales
Data Integration	Marketing Strategy	Outbound Call Campaigns
CRM	Inbound Marketing Campaigns	Lead Generation
Marketing Automation	Content Creation, Distribution and Tracking	Account Based Marketing

Virtual Causeway is unique in its capability to not just generate leads, but to **manage and qualify your sales funnel**. We combine digital inbound and outbound marketing tactics with teleprospecting to generate qualified leads.

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SAP Business Summary

<p>SAP Partners (since 2001)</p>	
<p>SAP Acquisitions (since 2001)</p>	
<p>SAP Corporate (since 2009)</p>	
<p>SAPinsider (since March 2017)</p>	

Certified SAP Marketing Agency – since 2012

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Key Offerings, Competencies & Strengths

Sales	Marketing	Research	Technology
Outbound Marketing	Inbound Marketing	Competitive Intelligence	Marketing Automation
Sales Appointment Setting	Content Marketing	Quantitative Research	Customer Relationship Management
Tele-prospecting	Lead Nurturing	Qualitative Research	Data Sourcing
Inbound Inquiries	SEO / SEM	List Development	Data Services
Lead Qualification	Email Marketing	List Cleansing	
Channel Development	Social Media		
Event Recruitment	Direct Marketing		

Integrated marketing drives SUCCESS!

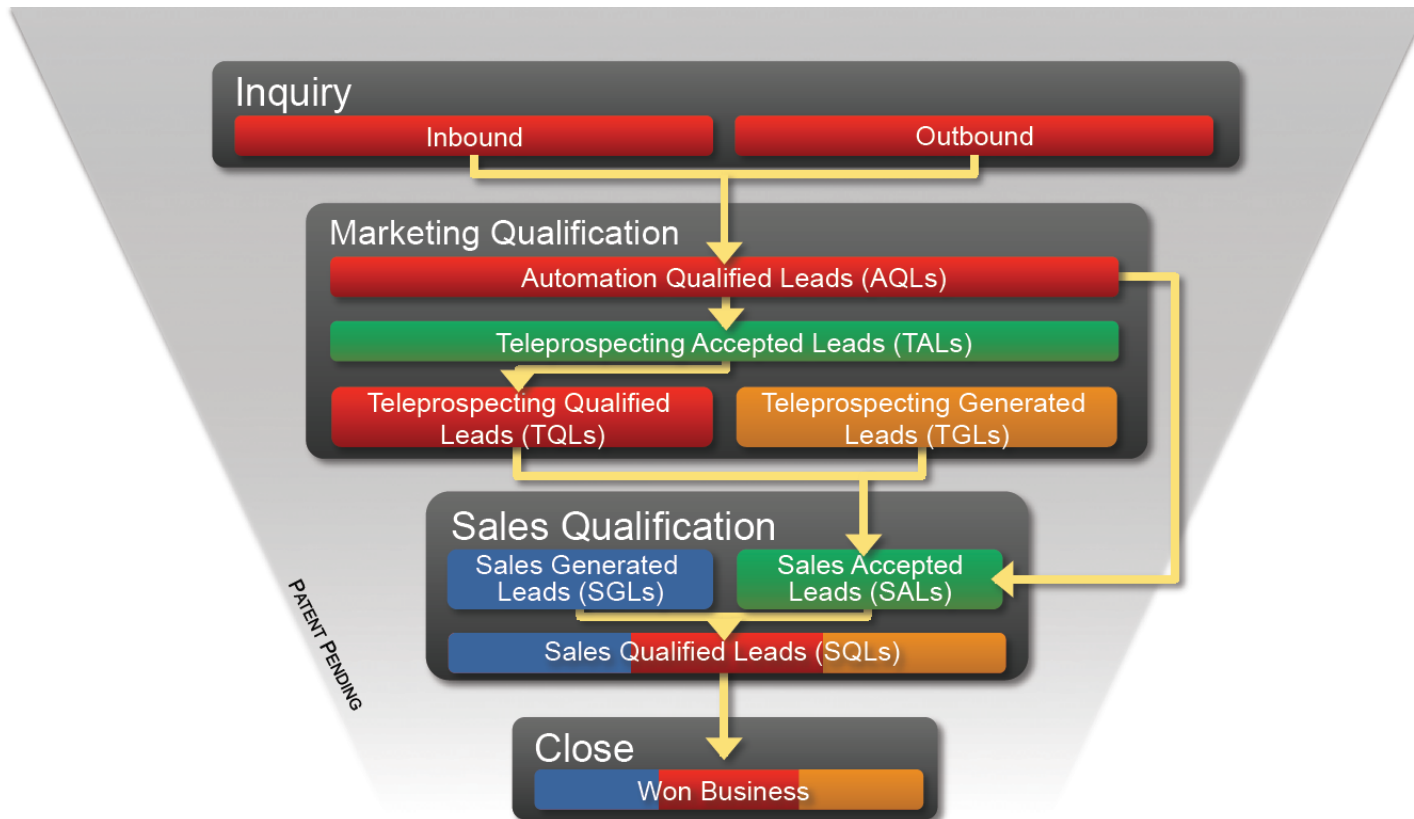
Virtual Causeway and SiriusDecisions

- SiriusDecisions is a benchmark and advisory firm that provides comparative analysis, metrics, advice and tools to improve sales and marketing effectiveness.
- Sirius empowers B-to-B marketing and sales leaders to make market-driven decisions and implement proven processes based on best practices that enhance performance.
- Virtual Causeway leverages the Sirius Decisions methodologies
- www.siriusdecisions.com



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SiriusDecisions Demand Waterfall



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Our CRM and Marketing Automation Consulting Team



- B2B demand center strategy, marketing technologies, customer relationship management (CRM) and process optimizations
- Strong focus on sales and marketing analytics

Ensure your sales marketing and
technology is optimized for
SUCCESS!

Some of Our Clients



EVENT SERVICES OVERVIEW

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Event Services Overview

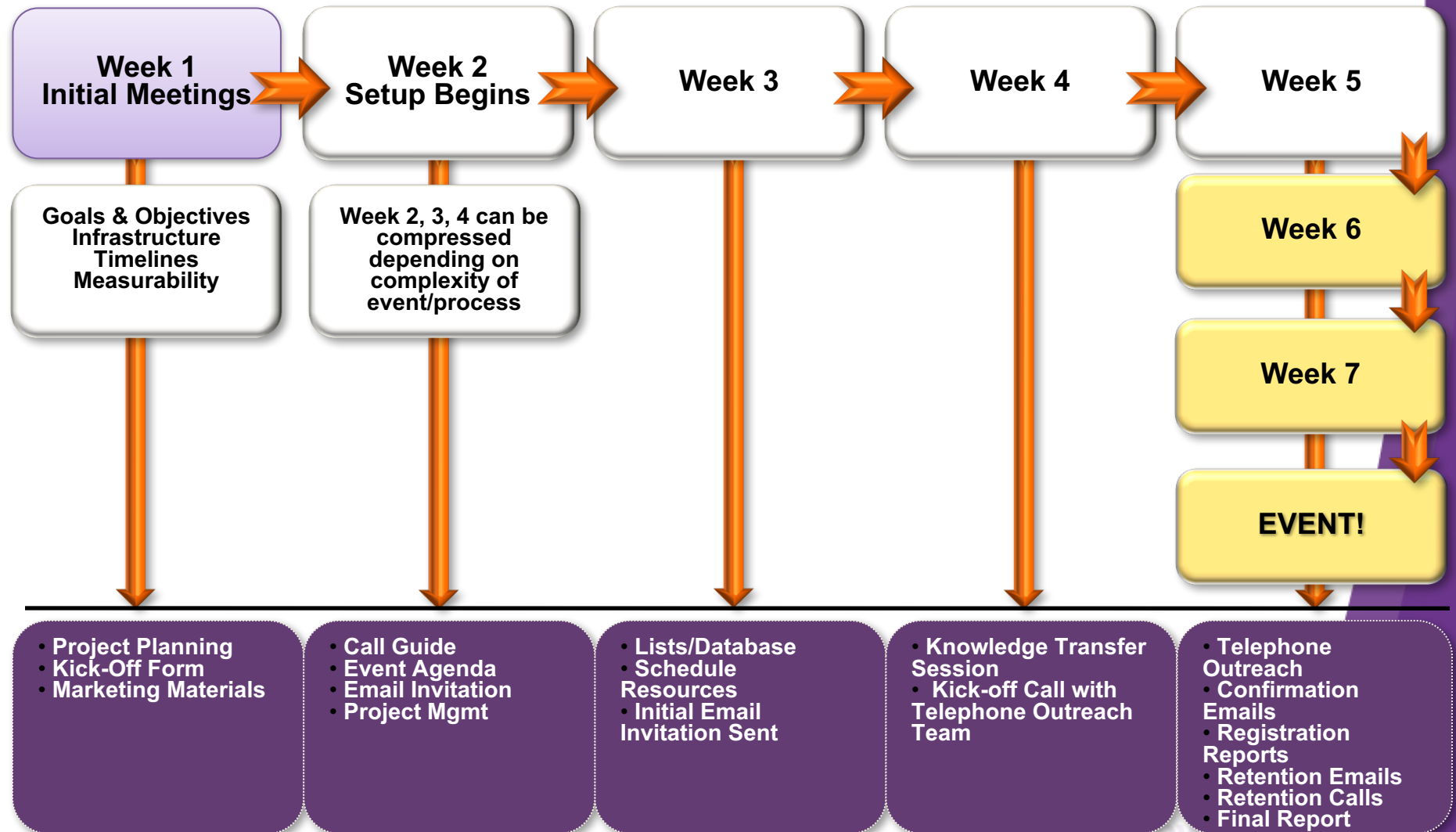
Virtual Causeway acts as a seamless extension of your sales and marketing team

- Audience Acquisition
- Event Management
- Event Followup and Nurturing
- Guided Voicemail
- Database Acquisition and Management



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Event Process and Playbook



Audience Acquisition Process

Virtual Causeway team reaches out by phone to the target prospect list. If a live connection is not made, a personalized voice mail and follow up email is sent promoting the event. Our goal is to work to reach the prospect live.



Primary Goal of the call:

- Inform them about the event – remind them of other marketing materials sent previously.
- Promote advanced registration and any promotional registration ‘offers’.
- Drive prospects to Wellesley Information Services Event Management’s registration page/portal for any registrants.
- Gauge interest level.
- Encourage registration and seek any additional contacts that may have an interest in attending the event.



Secondary Goal of the call:

- Awareness and branding.

Call Guide/Strategy Document

Virtual Causeway team members leverage the call guide or strategy document as a starting point.

Virtual Causeway's tele-prospecting outreach is designed to reach a prospect live. If a live connection is unsuccessful a personalized voice mail and follow up email is sent promoting the event.

Sample included – see attached.

Team Training

As an MSB Certified Agency, Virtual Causeway receives product specific training on SAP products as well as marketing messaging, talk tracks and objection handling. Training is typically.

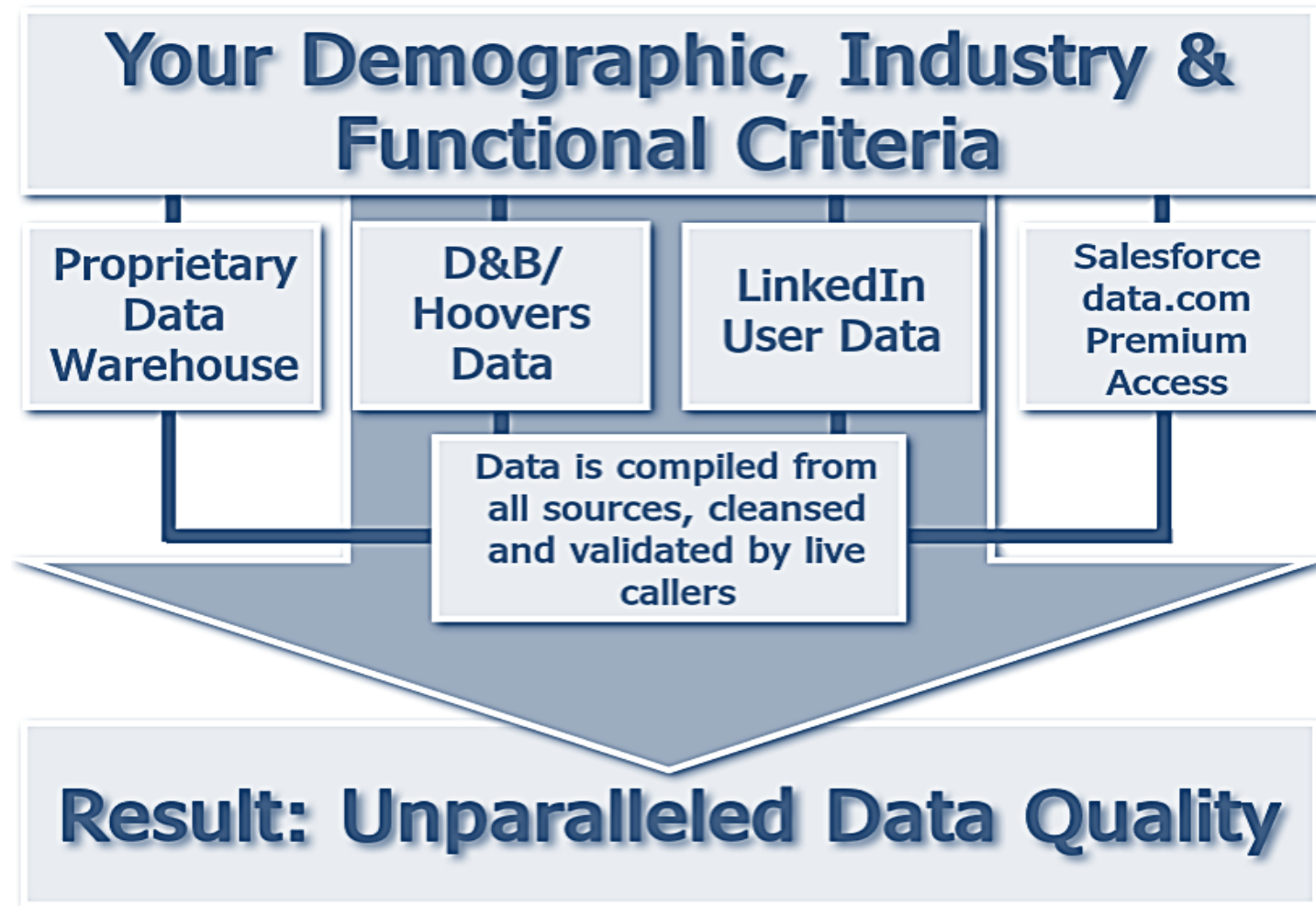
Skills based training is conducted ongoing with team members with formal coaching, training and team and project meetings.

Registrant Confirmation Process

- Confirmation emails generated automatically (by the client) when a contact registers online.
- Reach out to Virtual Causeway's registration list approximately 2 business days prior to the event date to remind them of the event, location, etc.
- If a live connection is unsuccessful a personalized voicemail left and an email message is sent.
- Client sends confirmation approximately 3 days prior and the day of the event.
- Calls to be coordinated with the client generated reminder email.



Virtual Causeway Data Ecosystem



Data Cleansing

Virtual Causeway to leverage client provided lists of target contacts (current customers, inbound leads and targeted contacts) in North America and UK for the purpose of Event Recruitment.



Match target contact list and also supplement with additional data:

- List Cleanse - Match client's list against our Proprietary Data Ecosystem (Virtual Causeway's Prospect Intelligence Database, D&B, Data.com, etc.) and pull in additional matching target contacts and append data (fill in the blanks) for existing contacts.
- Telephone outreach - data is updated and verified.
 - As prospects 'opt-in' they are available for future sales and marketing campaigns conducted by Wellesley Information Services.
- Data Export - Data is provided back to the client.

Data Warehouse

Virtual Causeway tracks and analyzes data from all marketing campaigns to optimize outreach and response rates – for ongoing projects, creating a data warehouse to store:

1. Implicit/Firmographic Information

- Target Title/Role
- Company Size, Industry
- Region/Geography

1. Activity Based Information

- Telephone Conversations
- Marketing Email opens and clicks
- Marketing Activity and Results (registration, not interested, etc.)
- Trends – best time of day for conversations, response by title or department, etc.

Additional Benefits

1. Identify Targeted Leads by Geographical Region for Future Campaigns.
2. Database will be Cleansed/Updated and Infused with New Records.
3. New Contacts Created for Future Events/Campaigns (Increased Sales Funnel).
4. Integrated Marketing Channels – Targeted Messaging.
5. Increased Awareness About the Brand/Event.



Who We Work With

We work with different types of organizations and help them with free and paid webinars, seminars, intimate round tables, educational events and user conferences.

- IT Vendors like Blackberry, OpenText, Sybase and SAP
- Event Management Companies like Nth Degree and Modern Media Partners
- Publication/Media Companies like CIO Magazine, NetworkWorld and InfoWorld

Our Clients

The logo for CFO Publishing, featuring the letters 'CFO' in a bold, red, serif font.

CFO Publishing

- CFO Playbook East, CFO Rising West

The logo for Dow Jones, featuring the words 'DOW JONES' in a bold, black, sans-serif font, with 'JONES' in blue.

Dow Jones

- Global Compliance Symposium, LP Summit, Private Equity Analyst Conference (PEAC)

The logo for IDG Enterprise, featuring the words 'IDG Enterprise' in a blue, sans-serif font, with 'IDG' in black and 'Enterprise' in blue. Below it, the text 'An IDG Communications Company' is written in a smaller, black, sans-serif font.

IDG Enterprise

- CIO, CSO, Computerworld, Network World, InfoWorld, IT World

The logo for SAP, featuring the letters 'SAP' in a bold, white, sans-serif font, set against a blue, trapezoidal background.

SAP

- Webinars, User Conferences, Road Shows, SAPinsider Events, Industry Specific Events, Lead Generation, Nurturing for SAP and SAP Partners

Our Clients

The logo for The Economist, featuring the words "The Economist" in white serif font on a red rectangular background.

The
Economist

The Economist

- Living with Climate Change, Ideas Economy Innovation Forum

The logo for The Wall Street Journal, featuring the words "WALL STREET JOURNAL" in a black serif font.

WALL STREET JOURNAL

The Wall Street Journal

- CEO Council, CFO Network, CIO Network, ECO:nomics, Women in the Economy



UBM TechWeb

- Dr. Dobb's, InformationWeek, Information & Technology

Our Clients

IDG Enterprise

An IDG Communications Company

COMPUTERWORLD InfoWorld NETWORKWORLD CIO DEMO CSO CIO Executive Council ITWORLD CFOworld CITE WORLD

Since 2006, Virtual Causeway has conducted email deployment and audience acquisition via telephone outreach for IDG Enterprise (CIO, CSO, Network World, Computerworld, InfoWorld) focusing on IT executives at some of the largest organizations in North America (conferences, dinners, roundtables, etc.).

DOW JONES

Since 2007, Virtual Causeway has conducted audience acquisition via telephone outreach and target account building programs for Dow Jones focusing on IT, finance, compliance and other C-Level executives at global enterprise organizations (conferences, memberships, paid events, etc.).

For both IDG Enterprise and Dow Jones, Virtual Causeway was responsible for audience acquisition and some key account development for a wide variety of events/conferences.

OUR TEAM

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Our Team

We realize that to be effective, the Virtual Causeway Team has to work as a virtual extension to your sales and marketing group. The Virtual Causeway Team is deployed based upon your specific campaign needs and required experience.



Campaign Manager – The Campaign Manager is responsible for the day to day operations of your campaign(s), and is your key point of contact. This includes implementation of the Client Engagement Process and development of the Campaign Execution Plan, Call Guide and Campaign Assessment. The Campaign Manager also manages the delivery of resources to meet your changing needs on extended campaigns.



Project Manager – The Project Manager is responsible for the knowledge and skill sets required by the Virtual Causeway Team. The Project Manager assists with the knowledge transfer on the solutions and services provided by Virtual Causeway clients. In addition, the Project Manager ensures the team is kept abreast of overall solution and industry trends by utilizing Industry Analysts, Trade Publications and other Third-Party sources.

Our Agents

Virtual Causeway has years of experience in outbound promotion of complex products and services and years of experience promoting and marketing SAP solutions such as; SuccessFactors, BusinessOne, Business All In One, HANA, S/4 HANA etc.

Our Agents are experienced at engaging executives in business level conversations. Team members are compensated with a base plus bonus incentives. In addition, gamification, contests and leader boards are used to motivate and encourage.

Marketing Services Specialist – The Marketing Services Specialist is the core of the team and the professional responsible for the calling aspect of the campaign. All Specialists are full time employees with college degrees and have an average tenure of 2-3 years with Virtual Causeway. Solution and sales and marketing training is provided on an ongoing basis.



- Bi-lingual Canadian French Native agents are available at an additional cost.
- Our teams are located at our Headquarters in Waterloo, Ontario, Canada. Calling is conducted from this location.
- We conduct outreach for targeting the USA, Canada (English and French) and some International countries (English speaking only).
- Our office hours from 8:00 am to 6:30 pm Eastern time to accommodate time zones across the Canada and the USA.

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SYSTEMS AND REPORTING

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Our Systems



Salesforce.com – Our teams leverage Salesforce.com CRM for all calling activities, email exchange with prospects, reporting and data management.



data.com

Data.com – Instant access to millions of top quality company profiles, business contacts and emails all in one place. Integration with Salesforce.com to pull in new contacts and compare against existing data fields.



pardot

Pardot – Our teams leverage Pardot marketing automation platform to deploy email and marketing communications.



Microsoft Excel – Used to send and receive data (lists). Program used for progress and registration reporting back to the client.

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Our Systems



InsideSales.com – Sales acceleration platform leveraged for outbound campaigns. Local calling presence, click to call, prospect queues, analytics, leaderboards and gamification.



VCW Proprietary Data Warehouse - Warehouse of IT decision makers. Built and maintained to support and supplement Virtual Causeway programs and campaigns.



Guided Voicemail – Turn voicemail into a powerful one-on-one marketing tool. We take a voicemail message that has been recorded and deliver it to a targeted list. Our agents accurately “guide” the pre-recorded message into the right person’s voice mailbox.

Sample Reports

Campaign Summary Report – Weekly, a campaign summary report including a registration list is shared with the client. The purpose is to share high-level details, identify trends and make recommendations for program improvements.

Sample included – see attached.

Campaign Contact Data Export – Excel file including contact lists received, appended and cleaned. Details included are the status of each individual contact record and notes from the call. Bad data is identified so that the data can updated back into our client’s CRM. Also, identified are new contacts built by the Virtual Causeway team.

Sample included – see attached.



DATA EXCHANGE

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Data Exchange

When working with Wellesley Information Services in the past data was shared via Excel files. This is outlined as Option 1.

Two options for consideration:

1. Data Exchange via Excel
2. Salesforce.com API Integration



Option1: Data Exchange

Data is shared via Excel files. Wellesley Information Services provides their unique Salesforce.com ID so that the data is easily updated back into Salesforce.com. An single data file is received for each event grouping.

List to be provided in Excel or CSV format with as many fields as possible to ensure the Virtual Causeway team can use all information to generate the best possible results, including: Company name, contact first name, contact last name, contact title, phone number with area code (as many as possible), email, mailing address, city, province, postal code, website, etc.

Full data export in Excel or CSV to be provided to the client upon completion of the event grouping including all data fields captured or updated. More frequent updates are available at an additional cost.



Option1: Data Exchange

Client provided data is then imported into Virtual Causeway's Salesforce.com CRM where customization enables the list to be cleaned and matched against our Proprietary Data Warehouse and Data.com.

This process pulls in additional target contacts in the accounts provided, fills in data gaps and identifies additional target contacts and accounts based upon target market criteria for the campaign.

The result, clean targeted data to begin the outbound campaign. Clean, well targeted data equals SUCCESS!



Option 2:

Salesforce.com API Integration

Virtual Causeway to integrate Salesforce.com lead updates into Wellesley Information Services Salesforce.com instance via API updates.

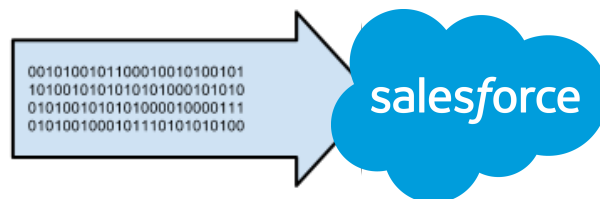
- New leads will push and pull between systems.
- Lead records assigned to Virtual Causeway as the lead owner will sync.
- Records owned by other team members will not be shared.
- Custom built API to push and pull data.
- Campaign updates from **Marketo** to Salesforce.com sync.

Salesforce.com Integration, API, Reporting and Program Analytics Setup - \$1,500

- API setup includes the cost of integration strategy session, field mapping, work flows in near real time
- One-time fee

Monthly Salesforce.com Integration, API, Reporting and Program Analytics - \$1,200/month (minimum 6 month commitment)

- Includes dashboard reporting and analytics
- Monthly review of fields and mapping to ensure data is maintained and up to date



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Option 2: Salesforce.com API Integration

Q, Find a dashboard... Edit Clone Refresh As of Today at 3:24 AM

API Log (Nightly)	
Date	Record Count
4/1/2016	1
3/31/2016	1
3/30/2016	1
3/29/2016	1
3/28/2016	1
3/27/2016	1
3/26/2016	1

Shows the progress of the nightly integration job. If there is not a record for a particular day, notify the administrator.

API Log (Every 30 Min)	
Date	Record Count
4/1/2016	5
3/31/2016	28
3/30/2016	28
3/29/2016	28
3/28/2016	28
3/25/2016	28
3/24/2016	28

Shows the progress of the integration that runs every 30 min (during business hours). If there is not a record for a particular day, notify the administrator.

API - Last Updated	
Integration Update	Record Count
4/1/2016	302
11/24/2015	1
11/5/2015	3
10/31/2015	1
8/7/2015	2
6/25/2015	1

Integration Lead Status	
Integration Lead Status	Record Count
Active Account	50
Disqualified	21
Inquiry	31
IS pipeline	1
List	271
Marketing Qualified Lead	51
MQL Criteria	27
MQL - SQL criteria not met	5
MQL - Working	6
not in target market	8
Nurture	37
Partner Qualified Lead	1
Pre - MQL - Virtual Causeway	8
Sales Qualified Lead	13

Shows the Lead Status from the client system.

Inquiries by VCW Lead Status	
Lead Status	Record Count
Not Contacted	11
Opportunity	4
Non-Target Contact	1
Do Not Approach	10

Shows the VCW leads that are still marked as Inquiry in the client system.

Inquiries by VCW Lead Status	
Integration Notes	Record Count
Error: Client lead is a converted lead, cannot update	1

IR Higher Ed - Logged Calls	
Assigned	Record Count
Today	

Logged Calls Audit for IntelliResponse Higher Education

IR Higher Ed - Logged Calls	
Assigned	Record Count
This Week	

Logged Calls Audit for IntelliResponse Higher Education

IR Higher Ed - Last Updated	
Client Lead Status	Record Count

▼ Integration Notes

Integration Update	1/13/2013 6:48 PM	Integration Owner Match	<input checked="" type="checkbox"/> Yes
Integration Notes	Success	Integration Lead Owner	Marlene Keay
Integration Update Required	0	Integration Duplicate	<input type="checkbox"/>
Integration Lead Status	Inquiry	Integration Audit Flag	<input type="checkbox"/>
		Integration Meeting Flag	<input checked="" type="checkbox"/>

- Sample dashboard and lead data to show the data exchange and tracking on leads and statuses.

PROPOSAL

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Program Overview

- Client supplied list of contacts - Excel or CSV list will be provided with as many fields as possible to ensure the Virtual Causeway team can use all information to generate the best result, including:
 - Company Name, Contact First Name, Contact Last Name, Contact Title, Phone Number with area code (as many as possible), Street Address, City, State, Zip, Company Website, Contact Email Address, Year the Contact Attended, etc.
- Event recruitment based upon the lead spectrum below:

L1

- Profile Fit
- Matches both the company and individual characteristics of a target profile (Job Function, Department, Company Size, Geography)

L2

- Qualified - Interest and Engagement
- Target decision-maker, coach or influencer identified. Need/Pain identified
- Genuine interest in learning more
- Prospect agrees to register and attend the in person event

Program Overview

- Resource hours are managed by your Virtual Causeway Project Manager. A minimum of three Marketing Services Specialists will be conducting outreach. This supports co-opetition and redundancy.
- Anyone can just call through a list. Our team members are strategic in their approach to optimize conversions.
- Our pricing model is structured with a pay-for-performance component based upon the number of registrants generated.
- Shared risk.



Canada, USA and EMEA Program Options

- Free events and paid events located in the USA
- Event Recruitment Process – up to 2 attempts, leave voice mail and follow up email
 - Additional outreach to hot prospects in an effort to convert (2+ attempts)

	USA/Canada	USA/Canada	UK English
Lead Definition	L1, L2	L1, L2	L1, L2
List Quantity	250	5,000+	600
Reg Goal	15	250+	30
Setup Fee	\$750	\$750	\$750
Tele-Boosting	\$4.50 per record	\$4.00 per record	\$6.50 per record
Variable per Registrant Fee	\$25.00 per reg	\$25.00 per reg	\$25.00 per reg

See attached file for summary and total pricing/costs

All prices are in US Dollars and are in effect for 60 days.

Q&A

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THANK YOU!

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Get in Touch!

Bill Clark

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and Business Development*

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