

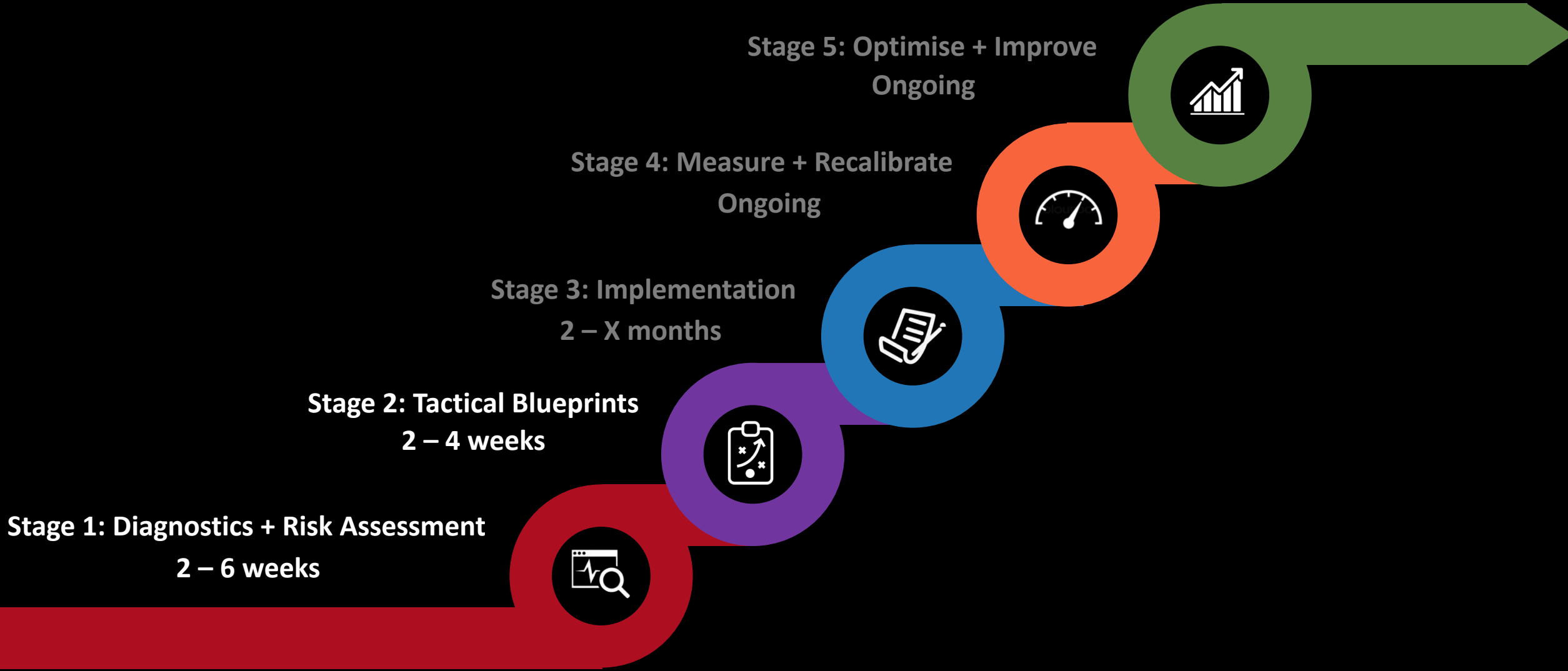
ENGAGEMENT SUMMARY

What does a Telemetry RT3 engagement with RevenueTEK look and feel like?



RevenueTEK^{⚙️}

ENGAGEMENT



1. DATA EXTRACTION AND DISCOVERY

01 SURVEY



Detailed internal survey and risk assessment correlated to 36 interconnected drivers of risk and performance, completed online by relevant internal and external stakeholders.

02 INTERVIEWS



Interviews with leadership, management and staff exploring in more depth issues identified within survey responses.

03 DATA



Review of qualitative and quantitative data from CRM, marketing and other relevant operational systems. Mapping and analysis of marketing and sales processes.

04 CBX & CHANNEL ANALYSIS



Online surveys of customers / clients, channel partners (distributors / resellers etc) to confirm understanding of customer problems, pain points, buying processes and experiences.

05 PEOPLE



Examination and profiling of manager & staff aptitudes for critical steps in the revenue process (e.g. closing). Identification and quantification of skills gaps and individual training and development requirements.

06 ANALYTICS & MODELLING



Predictive and prescriptive modelling of future revenue, margin and profit outcomes under different intervention scenarios and assumptions. forensic analysis of pipeline and other data extracts.

1a. TELEMETRY RT3 PERFORMANCE & RISK DRIVER - HEATMAPS

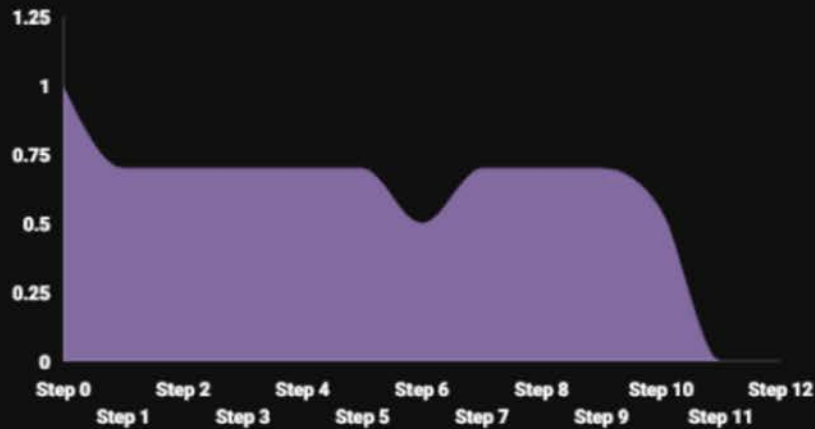
1. What's working? **GREEN**
2. What's not working? **RED**
3. Why? Or why not?
4. Where are our most immediate threats and opportunities for marginal improvement(s)?
5. Where should we prioritise?
6. What ROI / payback will we get if we do?



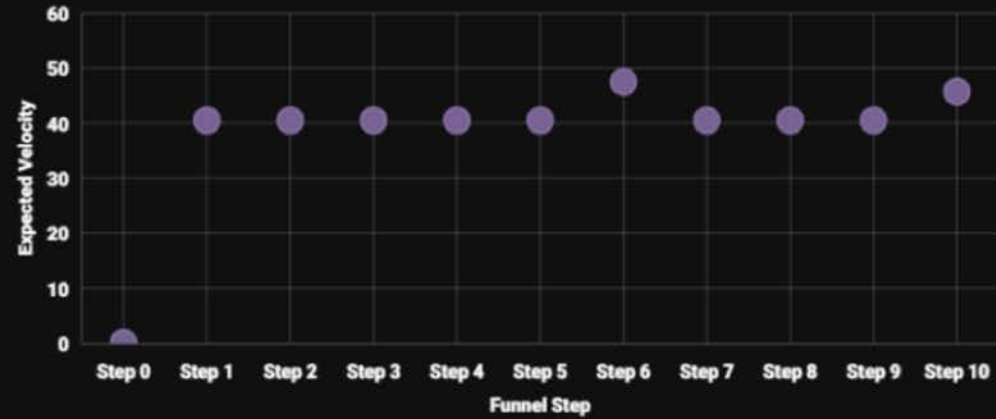
1b. TELEMETRY RT3 REVENUE BASELINE

| | Progress % | Expected to Progress | Recycle % | Recycle No. | Recycle Velocity | Velocity |
|------------------------|------------|----------------------|-----------|-------------|------------------|----------|
| Raw Leads | 100 | | 100 | | 0.00 | 0.00 |
| Recognised in Category | 71 | 4,612 | 20 | 922 | 30.00 | 39.6 |
| Troubled by Problem | 68 | 18 | 20 | 4 | 30.00 | 17.3 |
| Credentials | 66 | 21 | 20 | 4 | 30.00 | 42.8 |
| Need Defined | 69 | 17 | 20 | 3 | 30.00 | 72.3 |
| Propose Solution | 71 | 112 | 20 | 22 | 30.00 | 36.8 |
| Defeat Competition | 48 | 306 | 20 | 61 | 30.00 | 27.0 |
| Stakeholder Approval | 68 | 134 | 20 | 27 | 30.00 | 29.4 |
| Obtain Contract | 71 | 295 | 20 | 59 | 30.00 | 21.4 |

Progression Step %

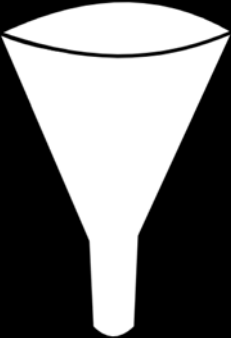


Total Days = 305.22

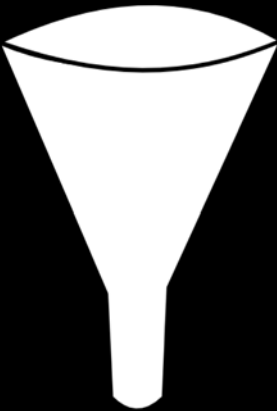


1c. E2E PIPELINE MODELING AND FORWARD RISK DETECTION

.....highlights problems months or even years *before* they occur?



| | Jul-20 | Aug-20 | Sep-20 | Oct-20 | Nov-20 | Dec-20 | Jan-21 | Feb-21 | Mar-21 | Apr-21 | May-21 | Jun-21 | |
|-------------------|---------------|---------------|------------|-------------|--------------|-------------|----------------|---------------|----------------|----------------|----------------|----------------|---------------------|
| Step 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Step 2 | 4,704 | 3,525 | 4,591 | 773 | 834 | 426 | 273 | 269 | 103 | 93 | 43 | 27 | |
| Step 3 | 19 | 5,197 | 1,086 | 2,734 | 452 | 705 | 227 | 132 | 186 | 73 | 58 | 26 | |
| Step 4 | 21 | 1,463 | 1,363 | 516 | 1,235 | 252 | 273 | 113 | 54 | 86 | 31 | 29 | |
| Step 5 | 17 | 7 | 1,484 | 402 | 151 | 707 | 12 | 137 | 50 | 29 | 49 | 17 | |
| Step 6 | 109 | 87 | 710 | 658 | 483 | 370 | 756 | 458 | 357 | 205 | 225 | 193 | |
| Step 7 | 309 | 229 | 536 | 632 | 1,155 | 764 | 613 | 487 | 1,022 | 668 | 404 | 470 | |
| Step 8 | 131 | 86 | 53 | 302 | 150 | 365 | 229 | 127 | 186 | 205 | 307 | 110 | |
| Step 9 | 301 | 86 | 99 | 26 | 68 | 385 | 152 | 135 | 161 | 208 | 77 | 251 | |
| Step 10 | 312 | 146 | 59 | 283 | 45 | 174 | 284 | 136 | 122 | 102 | 162 | 76 | |
| Avg Order | \$9,850 | \$9,850 | \$9,850 | \$9,850 | \$9,850 | \$9,850 | \$9,850 | \$9,850 | \$9,850 | \$9,850 | \$9,850 | \$9,850 | Total |
| Fractal | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | |
| Predicted | \$3,073,200 | \$1,438,100 | \$582,726 | \$2,783,019 | \$447,683 | \$1,718,037 | \$2,799,469 | \$1,339,600 | \$1,205,246 | \$1,003,912 | \$1,595,700 | \$745,448 | \$18,732,140 |
| Delta (\$) | (\$46,800.00) | (\$21,900.00) | \$2,726.00 | \$13,019.00 | (\$2,318.00) | \$8,037.00 | (\$130,532.00) | (\$20,400.00) | (\$124,754.00) | (\$116,088.00) | (\$204,300.00) | (\$114,552.00) | (\$757,862) |
| Delta % | -1.50 | -1.50 | 0.50 | 0.50 | -0.50 | 0.50 | -4.50 | -1.50 | -9.40 | -10.40 | -11.40 | -13.30 | |



| | Jul-20 | Aug-20 | Sep-20 | Oct-20 | Nov-20 | Dec-20 | Jan-21 | Feb-21 | Mar-21 | Apr-21 | May-21 | Jun-21 |
|---------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Step 1 | 1.00 | 1.00 | -3.00 | 1.00 | -1.00 | -3.00 | -3.00 | -5.00 | 1.00 | 1.00 | -3.00 | 1.00 |
| Step 2 | 2.00 | -2.00 | 1.00 | 2.00 | -2.00 | 1.00 | 1.00 | -2.00 | 2.00 | 2.00 | 1.00 | 2.00 |
| Step 3 | 3.00 | -3.00 | 4.00 | 3.00 | -3.00 | 4.00 | -2.00 | 0.00 | 3.00 | 3.00 | -2.00 | 3.00 |
| Step 4 | -1.00 | 2.00 | -4.00 | -1.00 | 1.00 | -4.00 | 2.00 | 0.00 | -1.00 | -1.00 | 2.00 | -1.00 |
| Step 5 | -2.00 | -1.00 | -1.00 | -2.00 | -2.00 | -1.00 | -6.00 | -3.00 | -2.00 | -2.00 | -6.00 | -2.00 |
| Step 6 | -3.00 | 1.00 | 2.00 | -3.00 | 1.00 | 2.00 | 2.00 | -6.00 | -6.00 | -3.00 | 2.00 | -3.00 |
| Step 7 | 1.00 | 1.00 | 1.00 | 1.00 | 4.00 | 1.00 | -1.00 | 0.00 | -8.00 | -7.00 | -1.00 | 1.00 |
| Step 8 | -2.00 | -3.00 | -1.00 | -2.00 | -4.00 | -1.00 | 1.00 | 0.00 | -7.00 | -8.00 | -8.00 | -10.00 |
| Step 9 | 2.00 | -2.00 | -3.00 | 2.00 | 1.00 | -3.00 | 1.00 | 0.00 | -7.00 | -10.00 | -11.00 | -11.00 |
| Step 10 | 0.00 | 0.00 | 2.00 | 2.00 | 1.00 | 2.00 | -3.00 | 0.00 | -8.00 | -9.00 | -10.00 | -12.00 |

1d. NEUROMETRIC & BIOMETRIC HEATMAPS OF TEAMS AND INDIVIDUALS



1. Have we got the right people in the right seats on the bus?
2. If not, where should we put those who aren't?
3. What training can we give my people to increase everyone's performance by 5%?
4. How can we recruit more high performers in the future?
5. How can we stop recruiting poor performers?

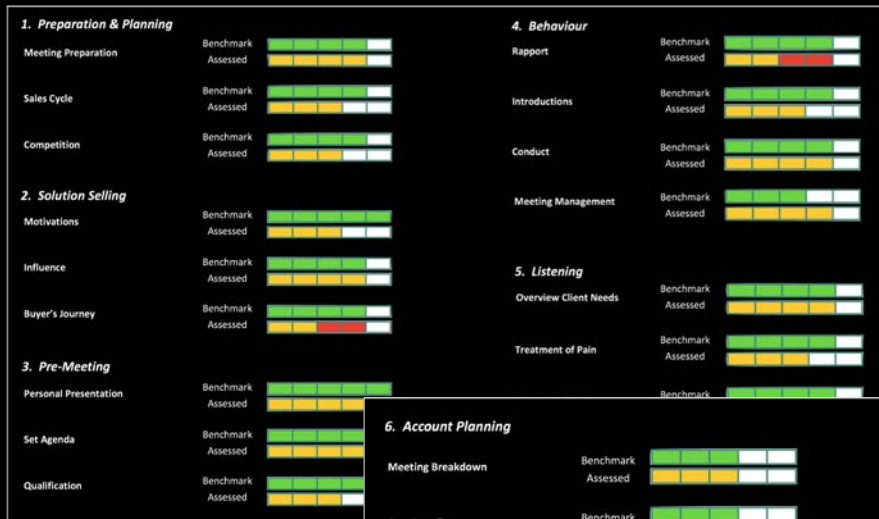
1e. INDIVIDUAL BEHAVIORAL PROFILES & BENCHMARKS

1. Which aspects of the sales process are our people most / least suited to?
2. Which sales skills could they be better at with some training?
3. Are there things they will never be good at?
4. What do ideal “hunters” and / or “farmers” look like?
5. How can we help my people be more effective in their customer / client communications (written + verbal + visual)?
Could we apply the same lessons to all of our marketing communications?

| Mark Sample's RPM Group International Executive Professional Summary Report | | | | |
|---|--|--|-----------|--|
| Development/Training Required | | Overall, has Potential & Further Evaluation Required | | Overall, is Competent Meets/Exceeds Benchmark |
| 0 | | 20 | | 50 |
| 60 | | 70 | | 80 |
| 90 | | 100 | | |
| Prova Benchmark Indicator | | Participant's Results | Benchmark | Indicator |
| DISC Behavioural Style | Dominance - (Results) | 90% | | Results Orientation - Extremely High |
| | Influencing - (People) | 5% | | People Orientation - Low |
| | Steadiness - (Process) | 0% | | Process Orientation - Very Low |
| | Conscientiousness - (Detail) | 5% | | Detail Orientation - Low |
| 5+2 Personality Dimensions | Extraversion | 56% | 75+% | Does Not Meet |
| | Agreeableness | 72% | 80+% | Further Evaluation |
| | Diligence (Goals & Tasks) | 76% | 80+% | Further Evaluation |
| | Emotional Stability/Control | 78% | 70+% | Meets/Exceeds |
| | Open-Mindedness/Flexibility | 86% | 75+% | Meets/Exceeds |
| | Emotional Intelligence | 73% | 75+% | Further Evaluation |
| Prova Profile Competency Strength Indicator | Optimism | 76% | 75+% | Meets/Exceeds |
| | Achievement Orientation | 95% | 80+% | Meets/Exceeds |
| | Goal Clarity | 75% | 80+% | Has Potential |
| | Persuasion & Influencing | 85% | 80+% | Meets/Exceeds |
| | Revenue Generation Drive | 100% | 80+% | Meets/Exceeds |
| | Revenue Generation Focus | 100% | 90+% | Meets/Exceeds |
| Business Development Strength Indicator | Democratic & Teamwork | 35% | 60+% | Development Required |
| | Attention to Detail | 35% | 60+% | Development Required |
| | Business/Entrepreneurial Orientation | 85% | 80+% | Meets/Exceeds |
| | RPMGI Sales Capability Indicator | 75% | 75+% | Meets/Exceeds |
| | Networking & Prospecting Ability | 78% | 75+% | Meets/Exceeds |
| | Stakeholder Engagement Orientation | 100% | 80+% | Meets/Exceeds |
| Business Development Strength Indicator | Relevant Revenue Generation Experience | 90% | 70+% | Meets/Exceeds |
| | Perception of Effectiveness | 90% | 70+% | Meets/Exceeds |
| New Business Development Professional Primary Orientation Indicator | | 98% | | Overall, is Competent Meets/Exceeds Benchmark |
| On-Going Relationship Management Professional Primary Orientation Indicator | | 84% | | Overall, has Potential & Further Evaluation Required |
| | | 61% | | Development/Training Required |

| Mark Sample's RPMGI Sales Capability Indicator | | | | |
|---|------------------------|--|-----------------|---|
| Development/Training Required | | Overall, has Potential & Further Evaluation Required | | Overall, is Competent Meets/Exceeds Benchmark |
| 0 | | 20 | | 50 |
| 60 | | 70 | | 80 |
| 90 | | 100 | | |
| Benchmark Indicator | | Participant's Results | RPMGI Benchmark | RPMGI Indicator |
| RPMGI Sales Capability Indicator | Prospect Engagement | 75% | 70+% | Meets/Exceeds |
| | Credential Positioning | 50% | 70+% | Development Required |
| | Need Identification | 60% | 70+% | Has Potential |
| | Solution Proposal | 78% | 70+% | Meets/Exceeds |
| | Concept Validation | 90% | 70+% | Meets/Exceeds |
| | Overcoming Objections | 90% | 70+% | Meets/Exceeds |
| | Closing | 100% | 70+% | Meets/Exceeds |
| | Following-Up | 60% | 70+% | Has Potential |
| Mark's RPMGI Sales Capability Indicator | | 75% | 75+% | Overall, is Competent Meets/Exceeds Benchmark |

1f. SALES TASK COMPETENCY ANALYSIS & BENCHMARKING



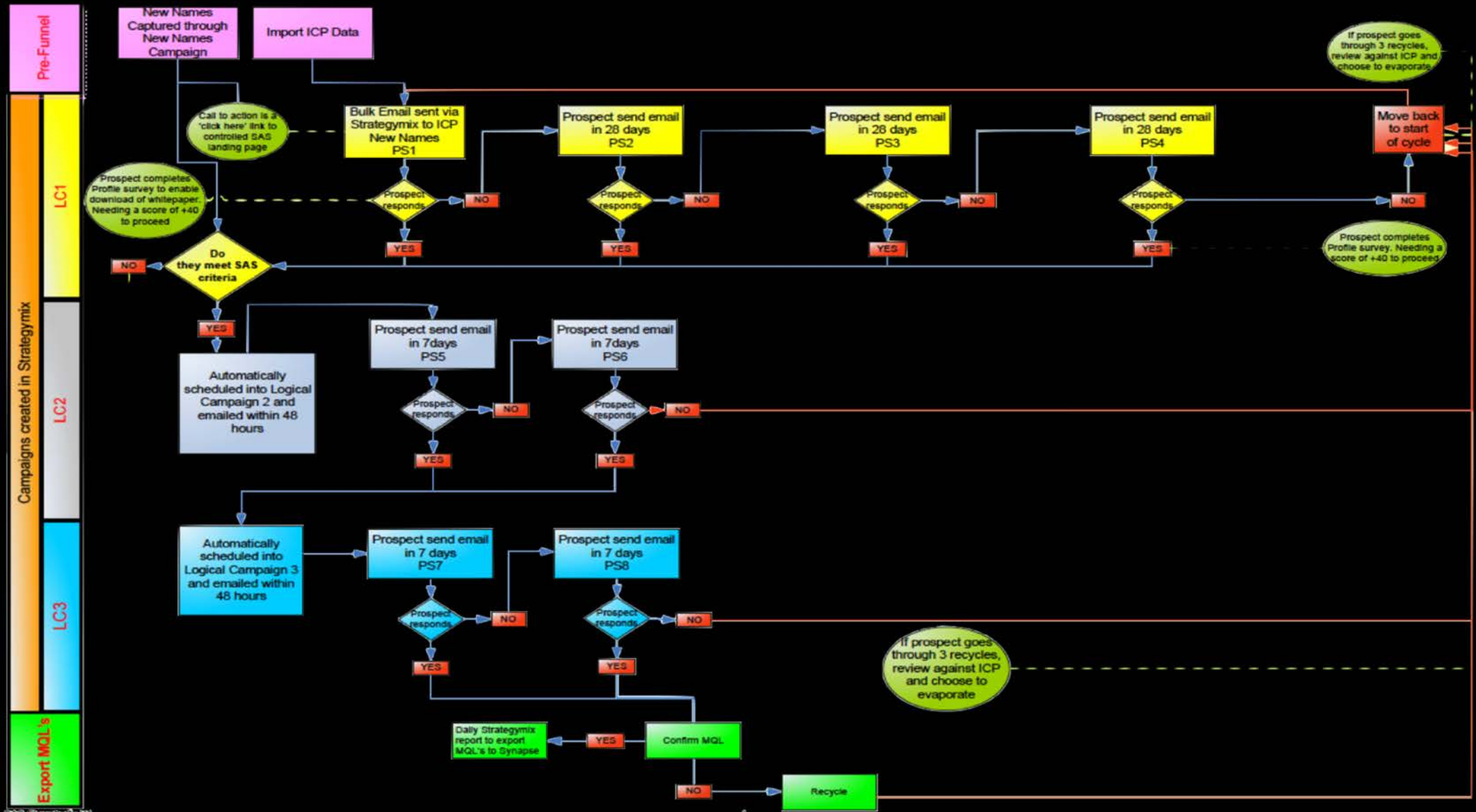
1. How does our performance at core marketing and selling tasks / skills compare with our peers, and against best practice?



1g. MARKETING & SALES PROCESS MAPPING AND ANALYSIS

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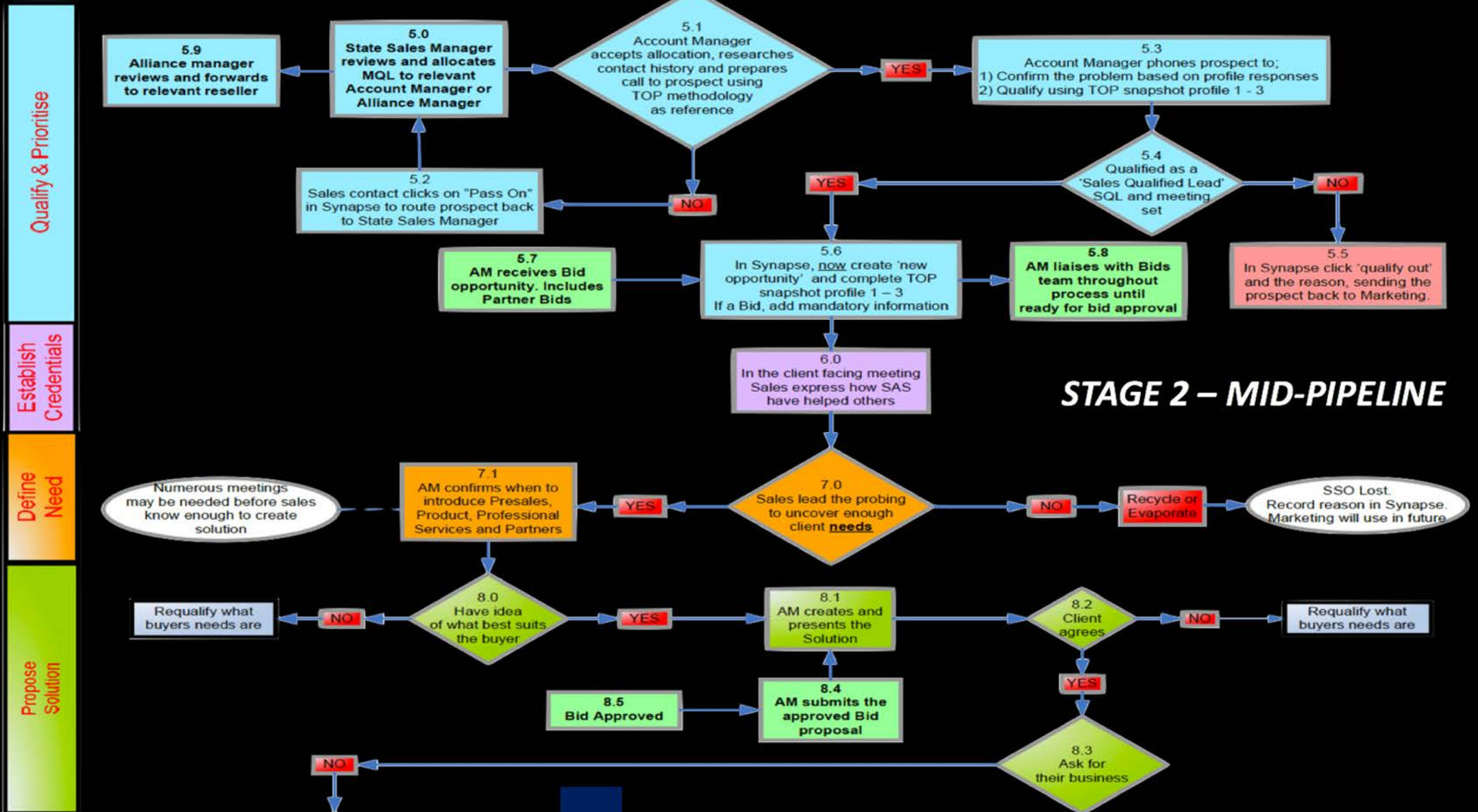
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1g. MARKETING & SALES PROCESS MAPPING AND ANALYSIS (CONT.)

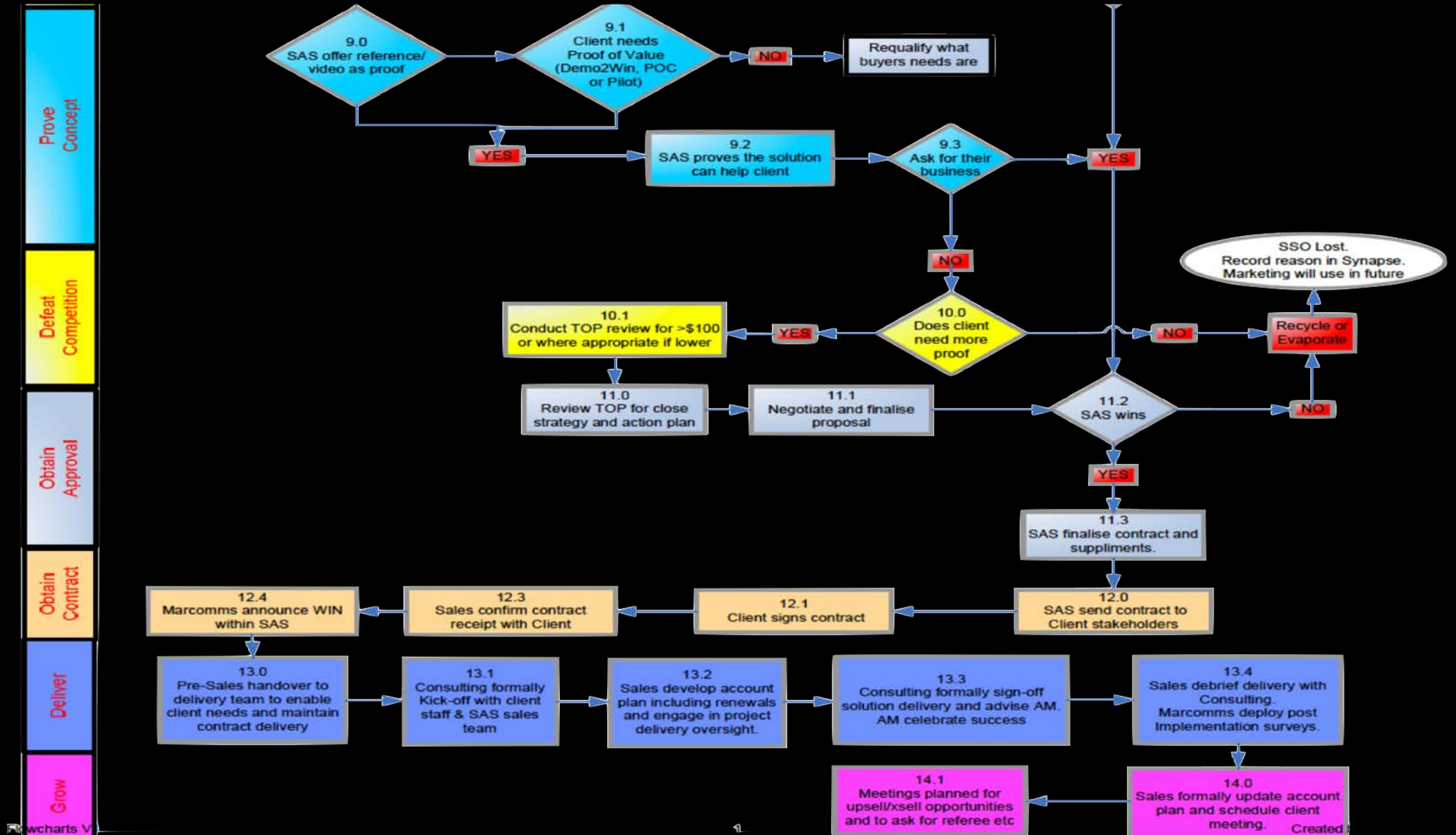
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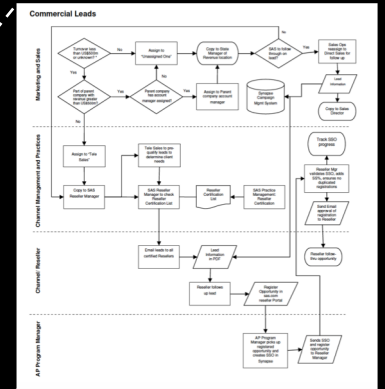
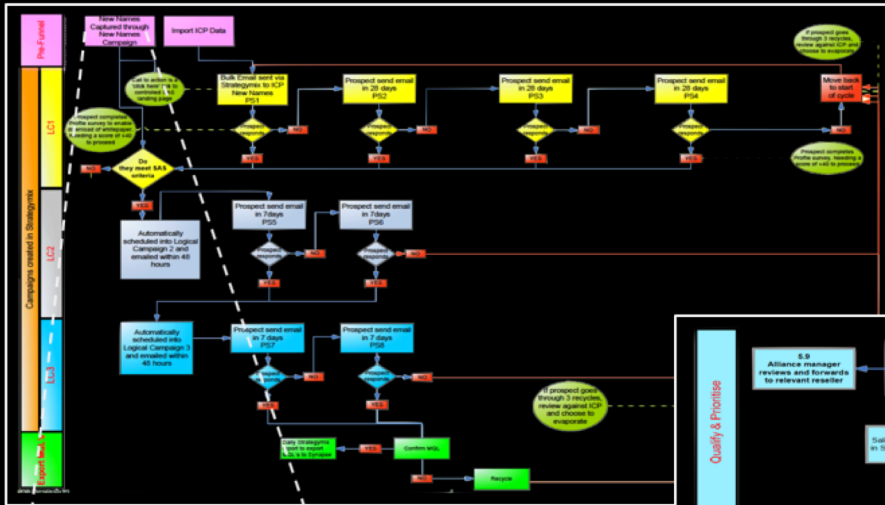


1g. MARKETING & SALES PROCESS MAPPING AND ANALYSIS (CONT.)

LOWER PIPELINE



Upper Pipeline

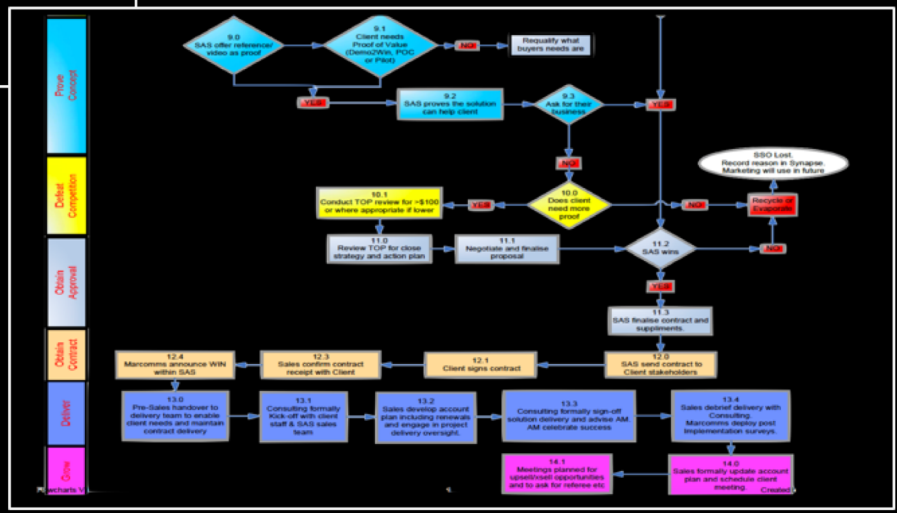


Mid Pipeline



Inside Sales Pre-Qualification

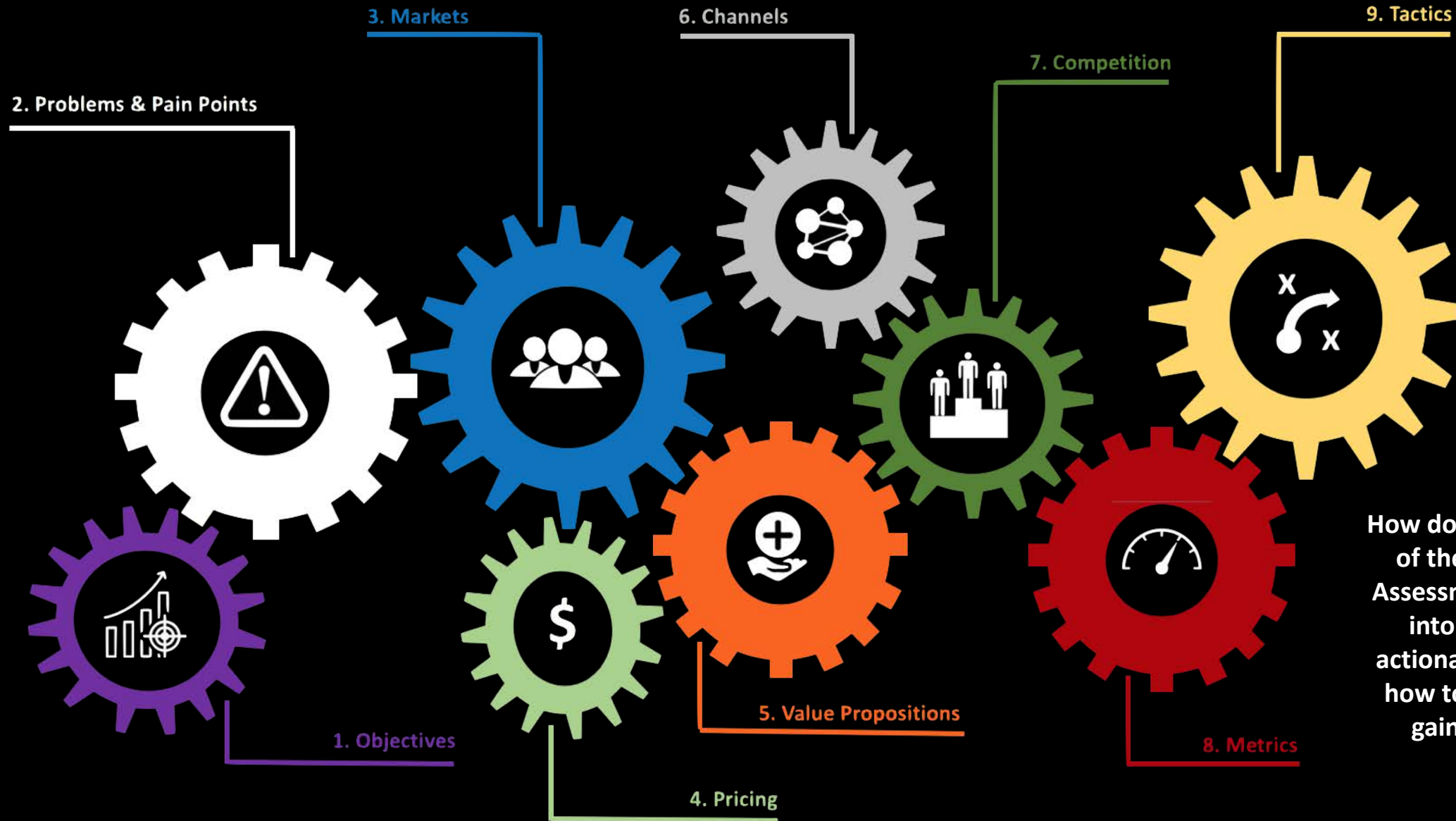
Lower Pipeline



E N D T O E N D

1. How are our marketing and sales systems processes working / not working?
2. What improvements should we consider, and what revenue and profit impacts can we expect from implementing them?

2. TACTICAL BLUEPRINTS



How do we take the results of the Diagnostics & Risk Assessment and turn them into a blisteringly clear, actionable set of plans for how to turn our marginal gain opportunities into reality?

1 REVENUE OBJECTIVES

| | FY 17 | FY 18 |
|--|---------------|---------------|
| <i>Asia Practice</i> | 700 | 735 |
| <i>Leadership, Talent & Culture</i> | 2,024 | 2,125 |
| <i>Technology Advisory & Solutions</i> | 7,915 | 8,311 |
| <i>Business Risk Services</i> | 2,158 | 2,266 |
| <i>Performance Improvement</i> | 2,300 | 2,415 |
| <i>Public Sector Advisory</i> | 3,240 | 3,402 |
| Total | 18,337 | 19,254 |

2 OFFERINGS

1. Asia Practice
2. Leadership, Talent & Culture
3. Technical Advisory & Consulting
4. Business Risk Services
5. Performance Improvement
6. Public Sector Advisory

3 PROBLEMS SOLVED

Significant change is creating complex business-critical problems that places us at risk. We simply don't have the knowledge, agility, resources and time to solve them ourselves.

4 CUSTOMER SEGMENTATION "IDEALCUSTOMER PROFILE"

Which Companies

Primary

- Healthcare and Social Assistance
- Education and Training
- Financial and Insurance Services

Secondary

- Construction
- Accommodation of Food Services
- Information Media and Telecom
- Government , Pub Administration & Safety

Who In These Companies

- CEO
- CFO
- Board,
- Senior Line Executive (depending on service line),
- Director General or equivalent

Ideal Client Profile

Behaviour

1. Dysfunctional behaviors (internal),
2. Capability misalignment,
3. New change agent,
4. Open to external help,
5. Investing in business,
6. Succession – leadership,
7. Workforce contention (churn, disengaged),
8. Sales & disposal,
9. Contractor merry-go-round,
10. Accelerating change.

Pain

1. Fear of losing their business home,
2. If we get this wrong,
3. Losing key staff,
4. Pride – fear of looking foolish to management, Board, shareholders, staff.
5. Threat of financial disaster,
6. Loss of control over business or key parts of the business,
7. Personal reputational damage.

5 VALUE PROPOSITION

"Why should I consider this offering?"

1. It's too painful not to,
2. Businesses that ignore it are failing or declining,
3. Cost of not solving,
4. I can't grow without solving it...and it will get worse,
5. Missing opportunities and competition will solve WIIFM personally.

"Why should I purchase this offering at all from you... instead of your competitors?"

1. No surprises – transparency – deliver what we say,
2. This is in our DNA....it's what we do – live and breath,
3. Focus on pragmatic – commercials outcomes,
4. We work together to provide a bespoke and tailored solution,
5. In chosen industries we are specialists and experts,
6. a) Senior on shore resources, b) fully integrated practice, c) people process and technology,
7. Will be delivered by hands on partners.

"How will I benefit from your offering? WIIFM... personally?"

1. No surprises – transparency – deliver what we say,
2. This is in our DNA....it's what we do – live and breath,
3. Focus on pragmatic – commercials outcomes,
4. We work together to provide a bespoke and tailored solution,
5. In chosen industries we are specialists and experts,
6. a) Senior on shore resources, b) fully integrated practice, c) people process and technology,
7. Will be delivered by hands on partners.

8 TELEMTRY MODELLING

| | F-17 | M-17 | A-17 | M-17 | J-17 | J-17 | A-17 | S-17 | O-17 | N-17 | D-17 | J-17 | Total Yr 1 |
|------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|
| <i>Mtly Rev</i> | 2000 | 2050 | 2050 | 2050 | 2050 | 1601 | 1601 | 1601 | 1601 | 1601 | 1601 | 1601 | 21457 |
| Find New | 300 | 0 | 300 | 0 | 500 | 0 | 200 | 0 | 0 | 0 | 0 | 0 | 1,300 |
| Position in | 270 | 38 | 260 | 90 | 467 | 77 | 213 | 3 | 21 | 11 | 8 | 3 | 1,477 |
| Identify | 158 | 109 | 171 | 115 | 282 | 103 | 3 | 89 | 21 | 15 | 7 | 5 | 1,298 |
| Qualify & | 127 | 80 | 139 | 89 | 228 | 147 | 110 | 75 | 17 | 16 | 5 | 6 | 1,038 |
| Establish | 51 | 55 | 114 | 52 | 157 | 100 | 152 | 50 | 62 | 8 | 13 | 3 | 827 |
| Define Need | 23 | 91 | 10 | 149 | 43 | 229 | 53 | 205 | 68 | 124 | 63 | 87 | 1,144 |
| Propose | 28 | 46 | 42 | 50 | 116 | 80 | 197 | 58 | 173 | 60 | 96 | 62 | 990 |
| Prove Concept | 14 | 44 | 47 | 44 | 99 | 76 | 146 | 61 | 109 | 46 | 99 | 49 | 867 |
| Defeat | 13 | 42 | 45 | 41 | 61 | 104 | 131 | 62 | 145 | 42 | 89 | 44 | 821 |
| Obtain Mgt | 16 | 38 | 39 | 38 | 53 | 98 | 82 | 85 | 89 | 98 | 43 | 73 | 728 |
| Obtain | 52 | 41 | 35 | 33 | 39 | 91 | 75 | 65 | 71 | 82 | 44 | 62 | 690 |
| Deliver | 0 | 41 | 27 | 26 | 56 | 30 | 62 | 33 | 108 | 46 | 90 | 43 | 573 |
| Grow | 0 | 8 | 13 | 24 | 15 | 24 | 25 | 36 | 36 | 52 | 30 | 44 | 307 |
| Projected | 1405 | 1405 | 1405 | 1405 | 1405 | 1405 | 1405 | 1405 | 1405 | 1405 | 1405 | 1405 | 31,826 |

6 CHANNEL STRATEGY

Primary Referral Networks

1. GT Network, GA clients
2. Industry specialists,
3. Personal networks,

Secondary Referral Networks

1. Overseas firms (Asia Pacific focus),
2. Asia Pacific Net (Asia Adv suited),
3. TAS vendors,
4. Industry associations,
5. Intermediaries program,

7 POSITIONING

Our Relative Strengths

- Customer awareness / focus
- Distribution
- USP
- References

Vulnerabilities

Salesforce, Market share, Cost

Neutral

- Product/service quality
- Innovation

Priority 1

10 a
Priority 1

Priority 2

10 b
Priority 2

Priority 3

10 c
Priority 2

2. TACTICAL BLUEPRINTS (CONT.)

Revenue Blueprint - SAMPLECO GROUP March 2016

| STRATEGIC OBJECTIVES | CUSTOMER SEGMENTATION - "IDEAL CUSTOMER PROFILE" | | | | | | | | | | | | PROBLEM SOLVED | | | COMPETITIVE POSITIONING | | |
|--|---|--|--|--|-------------------------------|--|--|--|---|--|--|--|--|--|--|---|--|--|
| Goal : Sales / Revenue Budget: \$ 41.5 m - 2014 Forecast: \$ 38.1 m To close the \$3.4m gap between budget and what is forecast for the end of the 2014 financial year. To build and profitable and strong company. Regarded as the number one suppliers in the multi channel communication space – executing brilliantly. End to end we will be better than anyone else across all communication channels (capturing data, cleaning data, distributing across all channels) | Demographic (Statistical / Observational / situational) | | | | Psychometric (How they think) | | | | Behavioural (How they do / How they behave) | | | | Pain (How they're being hurt / What they aren't afraid of) | | | Our Relative Strengths: • Unique Selling Proposition • Innovation • References Vulnerabilities: • USP Not Recognised • Cost Advantage • Sales Staff CHANNEL STRATEGY • Digital Agencies • Exact Target • Existing Clients • Procurement Australia • Analytics Companies • Print Brokers • Suppliers • BPO Consultants • MPO Consultants • Offset Printers • Procurement Brokers | | |
| | VALUE PROPOSITION I don't have the skills / resources / process to send / access / receive communications utilizing my customers communication channel of choice replicating across mail, email and SMS. It costs me revenue and customers are not satisfied. My customer retention and growth numbers are not what I want. | | | | | | | | | | | | | | | | | |
| | Why Will Buyers Consider This Offering? • You cant do this • Your competitors ARE doing it • You'll be left behind • Lose money – you will suffer | | | | | | | | | | | | | | | | | |
| | Why Will Buyers Purchase This Offering From YOU Instead of Your Competitors? • We have been doing this for others Proof - logos / case studies / testimonials • We live and breath this • Demonstrable results Proof - Energy Australia 100k emails in six weeks • Care – flexible (for you not us) | | | | | | | | | | | | | | | | | |
| | How will my organisation benefit from this offering AND WIFM Personally? • Our clients are her's • Steer you in the right direction • We'll challenge you • Got your back | | | | | | | | | | | | | | | | | |
| Final New Names 2,150 0 0 0 0 0 0 0 0 0 0 0 0 0 0 - 2,150 Position in Category 1,519 304 177 164 187 140 75 88 91 73 52 34 - 2,500 Identify Problem 103 463 305 431 177 82 87 87 52 32 32 50 - 1,842 Qualify & Prioritise 2 75 163 196 138 62 144 175 67 32 30 30 - 1,114 Establish Credentials 0 0 134 46 151 84 34 30 116 106 32 15 - 748 Define Need 2 2 88 97 34 216 131 58 166 134 900 166 - 1,280 Propose Solution 0 0 0 34 47 17 108 67 30 82 67 95 84 - 631 Process Concept 0 0 0 22 56 17 75 93 30 62 84 47 108 - 597 Defeat Competition 0 0 0 22 56 17 75 93 30 62 84 47 108 - 597 Obtain Mgt Approval 0 0 0 22 56 17 75 93 30 62 84 47 108 - 597 Obtain Contract 0 0 0 8 13 4 17 23 6 15 19 11 26 - 140 Deliver 0 0 0 2 17 4 6 30 9 9 26 11 11 - 125 | | | | | | | | | | | | | | | | | | |
| Financial Contract Value \$25,000 \$25,000 \$25,000 \$25,000 \$25,000 \$25,000 \$25,000 \$25,000 \$25,000 \$25,000 \$25,000 \$25,000 Predicted Net New Revenue \$0 \$0 \$161,628 \$332,256 \$187,750 \$431,000 \$538,750 \$161,628 \$377,125 \$484,875 \$289,375 \$446,000 \$3,501,875 | | | | | | | | | | | | | | | | | | |
| Final New Names 0 0 0 0 6 625 0 0 0 0 0 0 0 0 625 Position in Category 32 26 15 22 447 56 54 53 56 43 25 24 897 Identify Problem 43 26 24 19 36 143 95 131 53 27 32 28 605 Qualify & Prioritise 19 13 34 24 22 8 28 47 63 40 20 47 49 399 Establish Credentials 24 19 11 6 10 6 43 16 48 27 12 9 229 Define Need 129 112 175 114 32 50 63 54 48 99 61 39 614 Propose Solution 65 56 88 56 16 25 32 28 23 50 31 19 488 Process Concept 84 37 79 82 14 20 33 31 20 43 40 18 498 Defeat Competition 84 37 79 82 14 20 33 31 20 43 40 18 498 Obtain Mgt Approval 19 9 9 19 19 3 5 9 9 5 10 10 4 120 Obtain Contract 34 13 9 24 6 3 7 10 4 7 13 9 135 Deliver 0 0 0 2 17 4 6 30 9 9 26 11 11 - 125 | | | | | | | | | | | | | | | | | | |
| Financial Contract Value \$25,000 \$25,000 \$25,000 \$25,000 \$25,000 \$25,000 \$25,000 \$25,000 \$25,000 \$25,000 \$25,000 Predicted Net New Revenue \$484,875 \$215,500 \$484,875 \$83,333 \$125,000 \$208,333 \$187,500 \$125,000 \$250,000 \$250,000 \$104,167 \$5,503,625 | | | | | | | | | | | | | | | | | | |

| This Month (April) | | | | This Quarter (Q4 2014) | | | | Next Quarter (Q1 2015) | | | |
|---|--|--|--|--|--|--|--|---|--|--|--|
| <ul style="list-style-type: none"> Confirm number of names needed in the top of the funnel Collect all existing contacts currently held by staff Examine the structure of your team, what you are trying to achieve and the skills required. Are the right people on the bus and in the right seats? Implement opportunity plan and/or account plan (eg Blue Sheet) Review weekly sales meeting - include CSR Team From the revenue plan build a marketing plan and a sales plan Identify reports required to make relevant business decisions | | | | <ul style="list-style-type: none"> Establish engagement metrics and track progress over time Implement marketing automation Checklist – cheat sheet of questions that realise pain every time its asked Presentation skills training Provide simplified SEMA contract (T&C) Agree with sales when a lead will move from marketing to sales Create reports from the CRM to measure effectiveness and drive desired behaviours. Establish development plans for each staff member Establish regular training around product, process and the market | | | | <ul style="list-style-type: none"> Establish training for sales managers Profile key leadership and sales staff Use insight from profiling to establish reward and recognition that suits each individual profile Facilitation Skills Training Channel Partner referral program Case study to demonstrate how competitors / others are doing it better Benchmark existing 'campaigns' against industry benchmarks and publish results Review the requirement for a post implementation survey | | | |

problems that your business already solves for your buyers. The size of petitors were compared and discussed. The team created an initial list of

atement

gy and processes to send, access or ng our customers' preferred

re across mail, email and SMS. We and because our customers are and growth numbers are suffering.

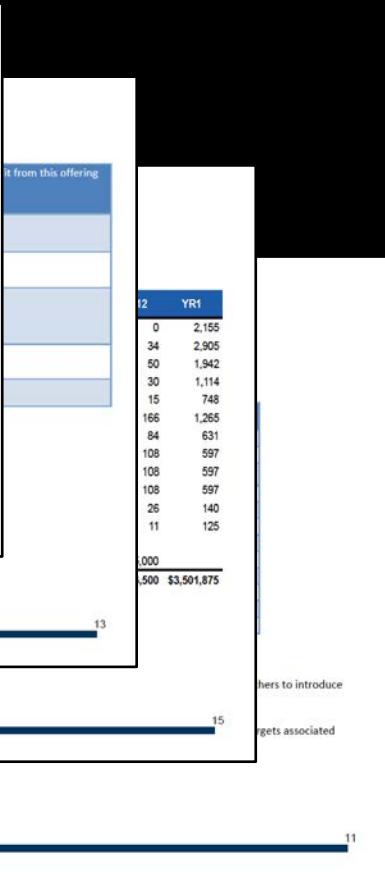
ed.

sts and can be used as thought starters for white papers, blogs and so on.

13

15

17



- at conferences and conferences. Confirm emers CMO's and
- web site. Multi
- Present at conferences and marketing conferences. Confirm t past customers CMO's and
- publish on web site. Multi
- ons that realise pain every time its m/ workshop current process to
- resentation updates. Distribute arts – Exact Target / HP / Pitney
- scope document to assist / confirm
- ences from new clients. Sense tal templates. Develop
- interests – develop good etry in the presentation to ensure a the tour.
- Procurement, Operations,
- key stakeholders by Sema. Project team and other customers.
- n points are – keep inflicting pain, satisfaction survey. Find and build
- next. Develop any specific armation to recycle.

2a. IDEAL CUSTOMER / CLIENT PROFILING (ICP's)

What does our ideal customer or client look like?

How will we recognize them?

Where can we find more of them?

How do they think? How do they behave?

What problems are causing them the most pain?

How can we communicate more effectively and talk to that pain?

| Demographic (Statistical / Observational / Situational) | Psychometric (How they think) | Behavioural (What they do / How they behave) | Pain (How they're being hurt / What they're afraid of) |
|--|--|---|--|
| 1. Physically located either CBD or within 20 km radius of CBD (postcodes) | 1. CEO / MD / Owner is a strong leader | 1. Institutionally owned real estate - being professionally managed | 1. Fear of losing their business "home" |
| 2. Located in Sydney, Melbourne, Brisbane | 2. CEO / MD / Owner is medium-long term thinkers | 2. Understand the benefit of focus on core activities & therefore outsourcing non-core activities | 2. Fear of distraction of a major move - business may suffer |
| 3. Employing > 25 "white collar" / office-based workers | 3. Has at least a 3 year planning horizon | 3. Used to paying for professional services and external advisors | 3. If we get this wrong..... |
| 4. Occupying at least 250 sq m | 4. Decisive decision maker(s) - when presented with compelling case | 4. Possesses a mature management structure and approach to managing the business, neither too laissez faire nor autocratic "balanced" | 4. Losing key staff |
| 5. Categorised as premium, A or B+ (from Cityscope or similar) | 5. Not prone to management by committee / consensus | 5. Partnership approach to business - informal, flexible style | 5. Pride - fear of looking foolish to management, the Board, shareholders or employees |
| 6. Business is at least 3 years old | 6. CEO is accessible / willing to listen / takes advice | 6. Financially / commercially "aware" | 6. Threat of financial disaster |
| 7. Ideally NOT zoned light industrial | 7. CEO and senior leadership understand the need for - and are not frightened of change. | 7. Making mature, well considered business decisions | 7. Loss of control over the business or key aspects of the business (e.g. Pitcher Partners Sydney) |
| 8. Currently in a fit-out which is more than 5 yrs old | 8. Business is "benchmark-aware" and therefore unlikely to be surprised or scared by high costs for necessary spends | 8. Strongly aware of and conscious of what their competitors are doing / want to be at least "on par" | 8. Personal reputational damage |
| 9. Business / Brand and its location don't "Fit" i.e. building is either not good enough or too good | 9. Currently frustrated by inability to make the most of their premises and "get it right" | 9. Messy, disorganised office / premises - lack of "order"; probably suffering storage issues | |
| 10. Suffering from relatively high staff attrition - but sensitive to it | 10. Concerned with and aware of value possible from employing good HR practices; good chair, nice surrounding | 10. Haphazard office arrangement, which is incongruent with how the business sees itself. Office has evolved into a shitfight | |
| 11. Expansion plans are people and therefore premises dependent | 11. HR leader is well respected in the business, and a "dog-fighter" | 11. Experiencing poor relationship, or frustrated with landlord | |
| 12. Lease expiring in the next 12-18 months | 12. Strongly aware of "brand" and how their workplace impacts their brand | 12. May be a project based business (e.g. miners) - winning work which is premises-dependent | |
| | 13. Proud of their business / office / brand and therefore afraid of anything that might cause damage | | |

2b. CUSTOMER / CLIENT PERSONAS

How do we profile our ideal customers / clients as individuals?

What do their lives look like?

What things worry and motivate them?

What are they frightened of?

What are they trying to achieve?

What are their biggest challenges?

Most importantly, how do we talk to these things in our marketing and in our selling conversations and maximise their interest and engagement?

- Managing Partner of T2 firm(s)
- Graduated from Sydney University in 1982 and completed ICAA Professional Year in 1995
- Married for 28 years with 3 children aged 24-31

Demographics

- Male
- Aged 32
- Annual income \$450K
- Lives Sydney upper north shore, 5 bedroom home

Goals

- Keep staff happy and content with low turnover
- Transition out of the firm to a 2-3 day per week consulting role
- Set the firm up well to succeed in rapidly changing environment

Jamie



Hobbies & Interests

- Reading
- Surfing
- Spending time with children and grandchildren
- Golf
- Chess
- Camping and hiking

Challenges

- Replacing shifting compliance base with higher value services
- Staying current with legislation and regulation
- Recruitment and retention of director and partner-level talent

Frequent Objections

- “We paid for website and e-commerce upgrade 3 years ago. Why do we need another one?”
- “I don’t see the ROI in technology that accelerates the commoditization of our cores services.”

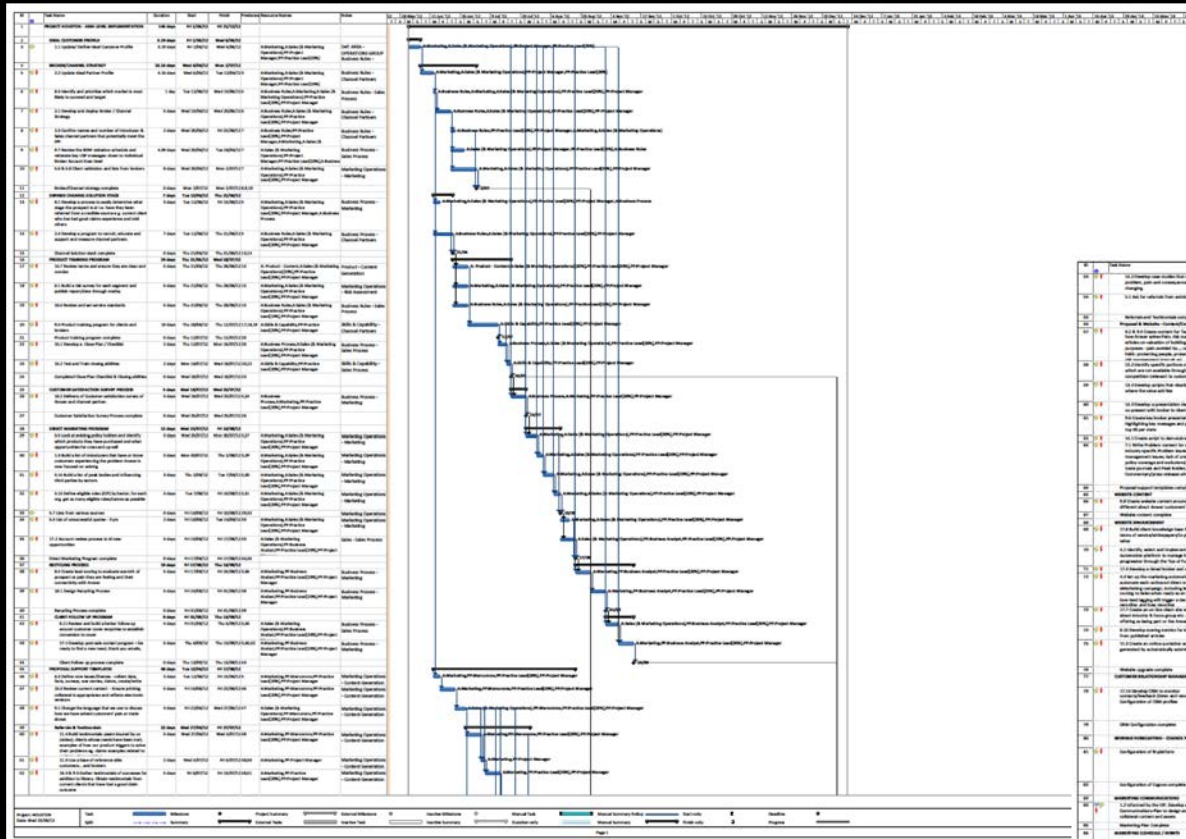
Fears

- Firm disintegrates after he retires
- Becoming irrelevant once he leaves the firm
- Not leaving a legacy he can be proud of.

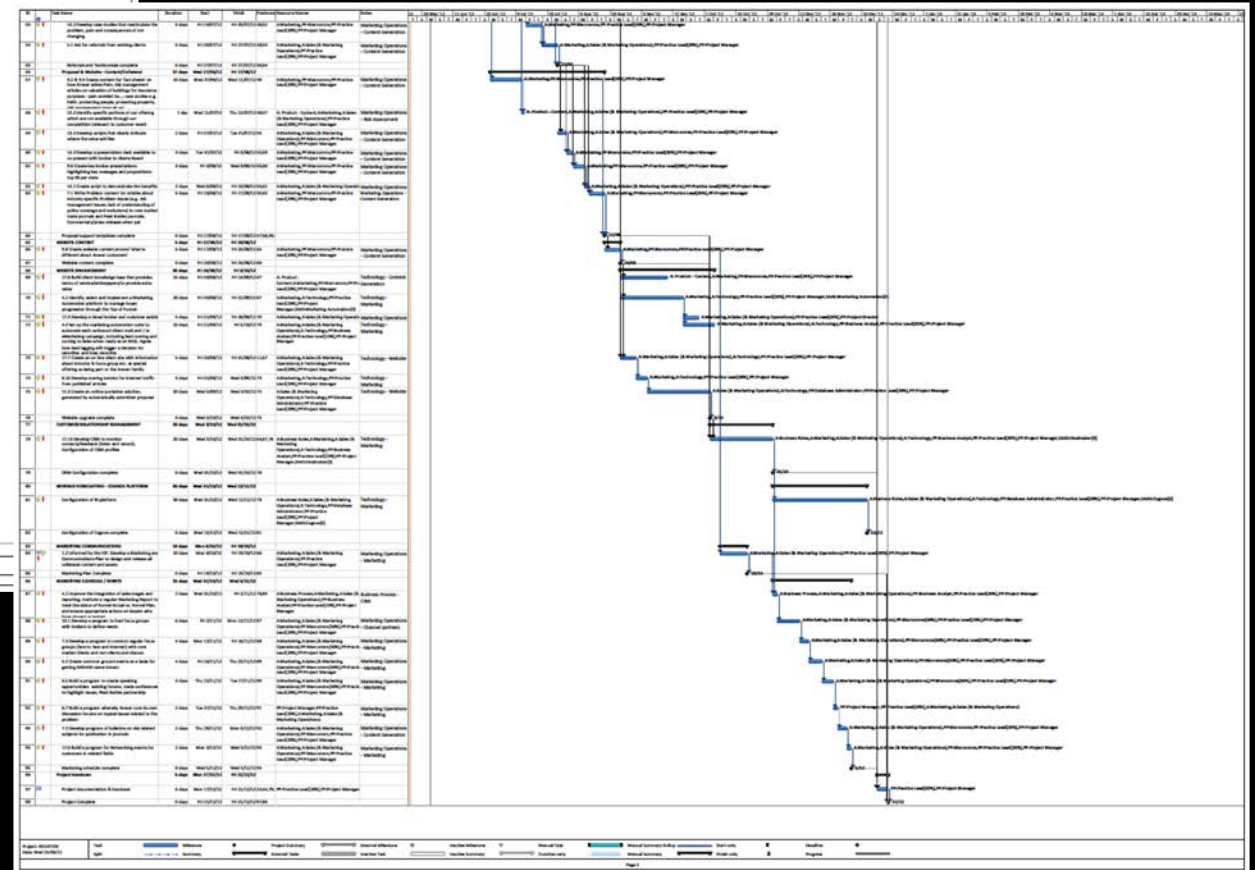
A close-up photograph of a white puzzle piece. The piece is missing a section in the center, revealing a bright red surface underneath. The word "value" is printed in white, lowercase letters on the red surface. The puzzle piece is surrounded by other white puzzle pieces, some of which are partially visible at the edges of the frame.

value

3. IMPLEMENTATION

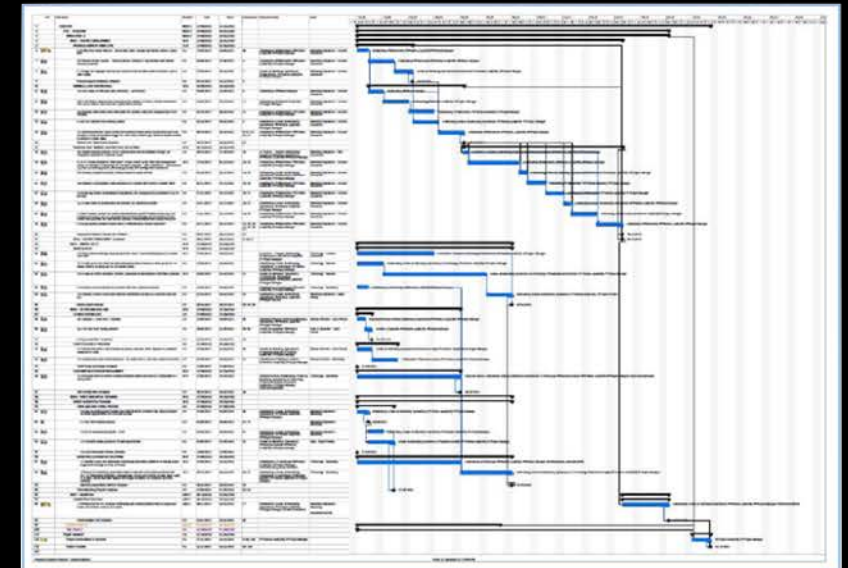
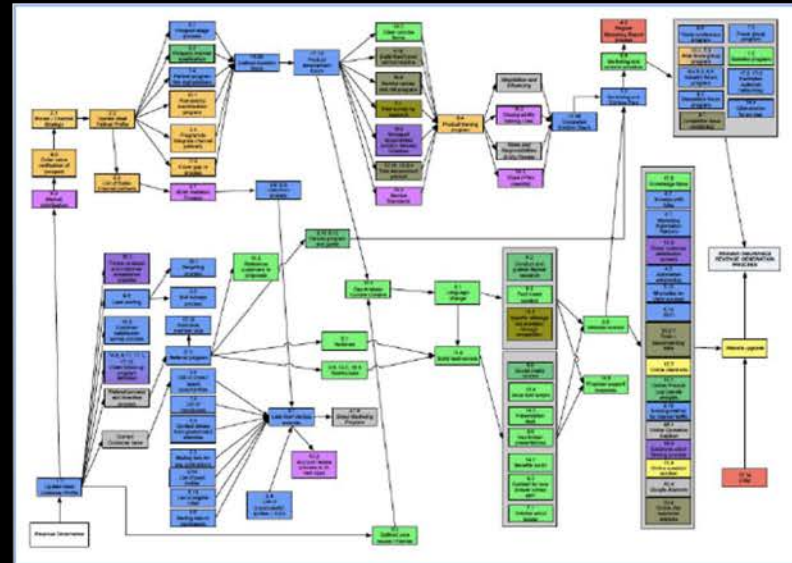
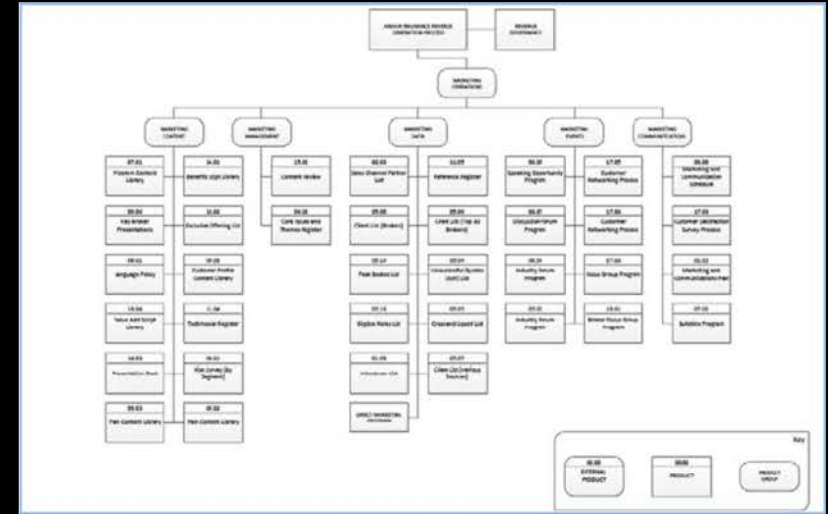
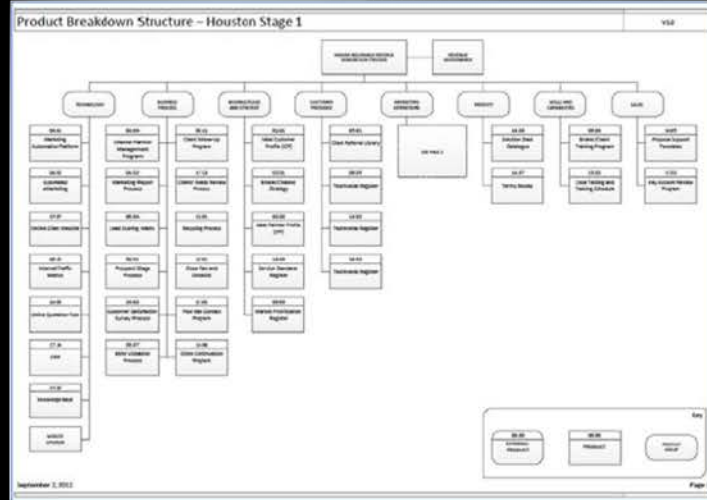


How can we implement our Blueprint(s) in a structured, professional manner that maximises our chances of success, while minimizing risk and cost?



3. IMPLEMENTATION (CONT.)

Can we implement our Blueprint(s) and marginal gain initiatives according to world's best practice for program and change management - including PRINCEII and Six Sigma?



Advertising & Promotion

Mobile Marketing

Display & Programmatic Advertising

Search & Social Advertising

Native/Content Advertising

Video Advertising

Content & Experience

Mobile Apps

Video Marketing

Content Marketing

DAM & MRM

Marketing Automation

CMS & Web Experience Management

Interactive Content

Optimization, Personalization

Lead Management

Customer Experience

Social & Relationships

Call Analytics & Management

Social Media Marketing & Monitoring

Customer Experience

Events, Meetings & Webinars

ABM

CRM

Commerce & Sales

Retail, Proximity & IoT Marketing

Sales Automation, Enablement & Intelligence

Ecommerce Marketing

Partner & Local Marketing

Marketing & Management

Ecommerce Platforms & Carts

Data

Audience/Marketing Data & Data Enhancement

Marketing Analytics, Performance & Attribution

Mobile & Web Analytics

Management

Talent Mgmt

Product Mgmt

Budgeting & Finance

1. WHAT MARKETING TECHNOLOGY DO I REALLY NEED?
2. HOW MUCH SHOULD I PAY?
3. HOW DO I IMPLEMENT IT / THEM?

3b. CONTENT DEVELOPMENT



How do we develop powerful, crisp, compelling content that is topical and relevant for our ICP's and personas?

How do we make sure that our content talks Directly to our ICP's problems and pain points?

How do we implement and follow industry best practice for development and delivery of our content?

How do we ensure that our marketing and sales content remains consistent across our marketing channels and right the way down through our revenue pipeline(s)?



Engagement

INTERNET

ONLINE MEETING & SHARING

EMAIL

EMAIL TOOLS

VOICE

SALES DIALER

EMAIL

LEAD DISTRIBUTION & CALL MANAGEMENT

CHAT/MESSAGING

PROACTIVE ENGAGEMENT

CHAT/MESSAGING

SIGNALS

SOCIAL

MOBILE & FIELD SALES ENABLEMENT

IN-PERSON

SALES ACTIVITY LOGGING



Productivity & enablement

SALES CONTENT & COLLABORATION

CONTENT SHARING

SALES ORCHESTRATION

SCHEDULING & APPOINTMENT

QUOTE & PROPOSAL

CONTRACT & E-SIGNATURE

PARTNER MANAGEMENT & CHANNEL ENABLEMENT

SALES GAMIFICATION



Sales intelligence

DATABASE & LIST SERVICES

ACCOUNT INTELLIGENCE

COMPANY FINANCIAL INTELLIGENCE

TECHNOGRAPHICS

BUYER INSIGHTS

CONTACT INFORMATION

CALL TRACKING & INTELLIGENCE

VISITOR INTELLIGENCE & REVERSE IP LOOKUP

WEB & SOCIAL PROSPECTING



Pipeline & analytics

PIPELINE MANAGEMENT (CRM)

FORECASTING & PERFORMANCE MANAGEMENT

SPEECH & CONVERSATION ANALYTICS

PRICE OPTIMIZATION & REVENUE MANAGEMENT

DATA VISUALIZATION

PREDICTIVE ANALYTICS

ACCOUNT-BASED PLANNING



People management

ONBOARDING & TRAINING

SALES COACHING

SALES APPRAISAL

INCENTIVES & COMMISSIONS

TERRITORY & QUOTA MANAGEMENT

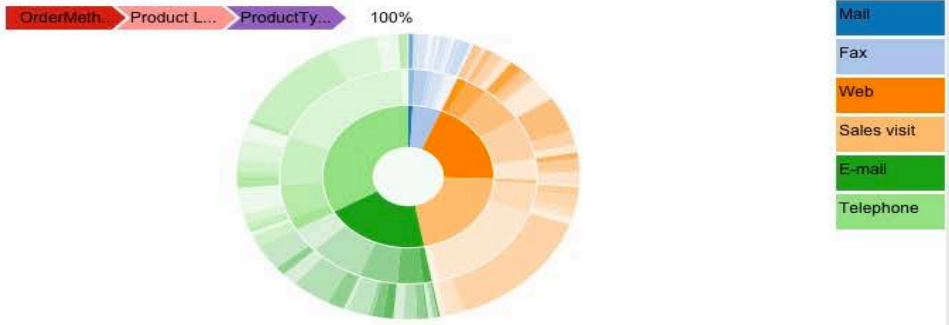
1.

WHAT ABOUT THE SALES TECHNOLOGIES?

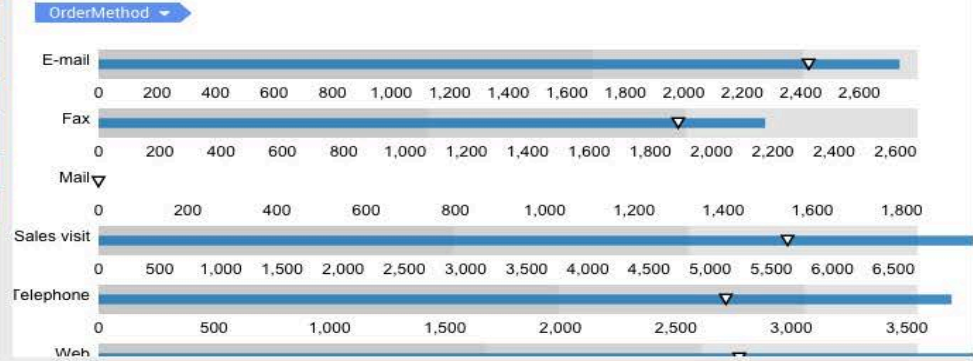


Dashboard Synchronization

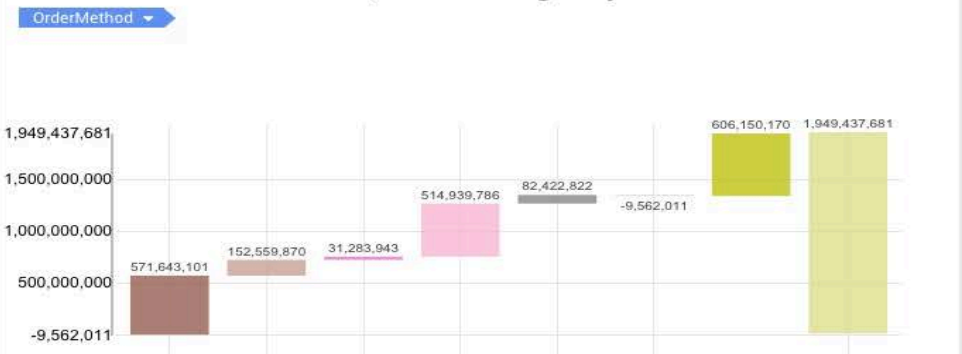
Sales Amount, Profit Margin by OrderMethod



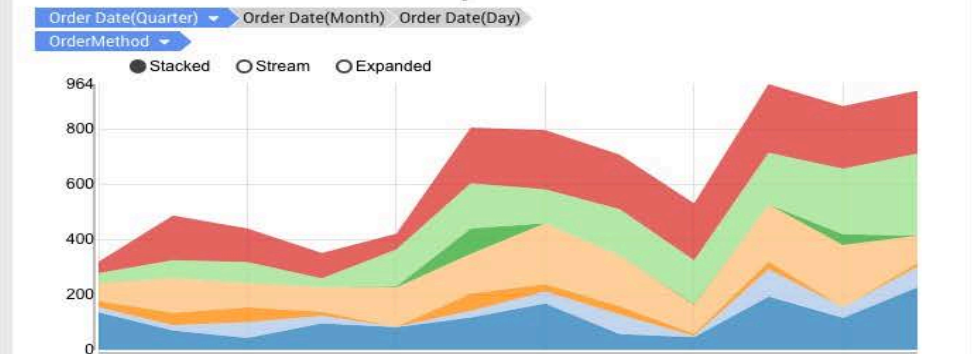
Sales Amount, Profit Margin by OrderMethod



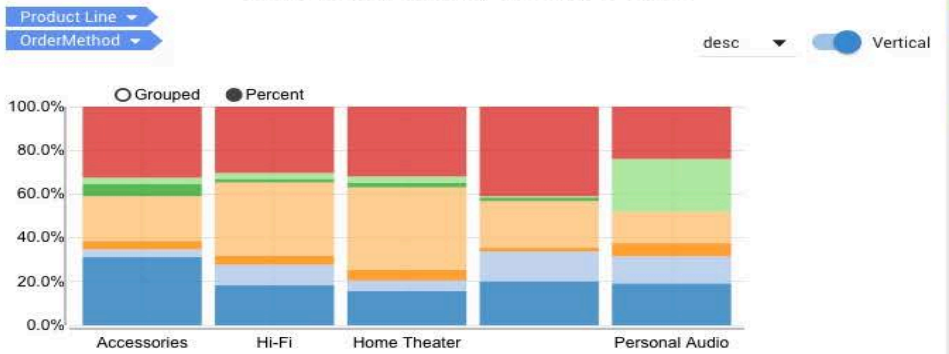
Sales Amount, Profit Margin by Order Date



Count by Order Date



Sales Amount by Product Line



Sales Amount, Profit Margin by Order Date

Country Region City

| | | | 2014 | |
|-----------|-----------------|-----------|--------------|---------------|
| Country | Region | City | Sales Amount | Profit Margin |
| Australia | New South Wales | Bourke | 118,297 | 106,247 |
| | | Merimbula | 810 | 640 |
| | | Sydney | 107,077 | 98,397 |
| | Queensland | Brisbane | 58,352 | 55,852 |
| | South Australia | Adelaide | 6,126 | 3,396 |

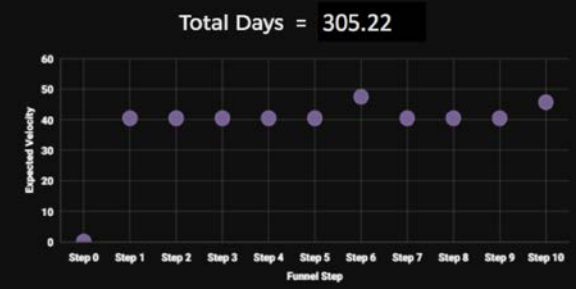
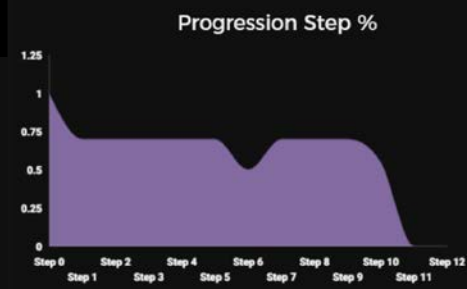
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RT3 PIPELINE SCANNING ANALYTICS

| | Progression Step % | Expected Leads to Progress | Recycle % | Recycle Leads | Recycle Velocity | Lead Velocity |
|--------|--------------------|----------------------------|-----------|---------------|------------------|---------------|
| Step 1 | 1.00 | | 0.00 | | 0.00 | 0.00 |
| Step 2 | 0.71 | 4,612 | 0.20 | 922 | 30.00 | 39.6 |
| Step 3 | 0.68 | 18 | 0.20 | 4 | 30.00 | 17.3 |
| Step 4 | 0.66 | 21 | 0.20 | 4 | 30.00 | 42.8 |
| Step 5 | 0.69 | 17 | 0.20 | 3 | 30.00 | 72.3 |
| Step 6 | 0.71 | 112 | 0.20 | 22 | 30.00 | 36.8 |
| Step 7 | 0.48 | 306 | 0.20 | 61 | 30.00 | 27.0 |
| Step 8 | 0.68 | 134 | 0.20 | 27 | 30.00 | 29.4 |
| Step 9 | 0.71 | 295 | 0.20 | 59 | 30.00 | 21.4 |

| | Jul-20 | Aug-20 | Sep-20 | Oct-20 | Nov-20 | Dec-20 | Jan-21 | Feb-21 | Mar-21 | Apr-21 | May-21 | Jun-21 |
|---------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Step 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Step 2 | 4,704 | 3,525 | 4,591 | 773 | 834 | 426 | 273 | 269 | 103 | 93 | 43 | 27 |
| Step 3 | 19 | 5,197 | 1,086 | 2,734 | 452 | 705 | 227 | 132 | 186 | 73 | 58 | 26 |
| Step 4 | 21 | 1,463 | 1,363 | 516 | 1,235 | 252 | 273 | 113 | 54 | 86 | 31 | 29 |
| Step 5 | 17 | 7 | 1,484 | 402 | 151 | 707 | 12 | 137 | 50 | 29 | 49 | 17 |
| Step 6 | 109 | 87 | 710 | 658 | 483 | 370 | 756 | 458 | 357 | 205 | 225 | 193 |
| Step 7 | 309 | 229 | 536 | 632 | 1,155 | 764 | 613 | 487 | 1,022 | 668 | 404 | 470 |
| Step 8 | 131 | 86 | 53 | 302 | 150 | 365 | 229 | 127 | 186 | 205 | 307 | 110 |
| Step 9 | 301 | 86 | 99 | 26 | 68 | 385 | 152 | 135 | 161 | 208 | 77 | 251 |
| Step 10 | 312 | 146 | 59 | 283 | 45 | 174 | 284 | 136 | 122 | 102 | 162 | 76 |



| | Jul-20 | Aug-20 | Sep-20 | Oct-20 | Nov-20 | Dec-20 | Jan-21 | Feb-21 | Mar-21 | Apr-21 | May-21 | Jun-21 | Total |
|------------|---------------|---------------|------------|-------------|--------------|-------------|----------------|---------------|----------------|----------------|----------------|----------------|--------------|
| Avg Order | \$9,850 | \$9,850 | \$9,850 | \$9,850 | \$9,850 | \$9,850 | \$9,850 | \$9,850 | \$9,850 | \$9,850 | \$9,850 | \$9,850 | \$9,850 |
| Fractal | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 | 1.00 |
| Predicted | \$3,073,200 | \$1,438,100 | \$582,726 | \$2,783,019 | \$447,683 | \$1,718,037 | \$2,799,469 | \$1,339,600 | \$1,205,246 | \$1,003,912 | \$1,595,700 | \$745,448 | \$18,732,140 |
| Delta (\$) | (\$46,800.00) | (\$21,900.00) | \$2,726.00 | \$13,019.00 | (\$2,318.00) | \$8,037.00 | (\$130,532.00) | (\$20,400.00) | (\$124,754.00) | (\$116,088.00) | (\$204,300.00) | (\$114,652.00) | (\$757,862) |
| Delta % | -1.50 | -1.50 | 0.50 | 0.50 | -0.50 | 0.50 | -4.50 | -1.50 | -9.40 | -10.40 | -11.40 | -13.30 | |

| | Jul-20 | Aug-20 | Sep-20 | Oct-20 | Nov-20 | Dec-20 | Jan-21 | Feb-21 | Mar-21 | Apr-21 | May-21 | Jun-21 |
|-------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Raw Lead | 1.00 | 1.00 | -3.00 | 1.00 | -1.00 | -3.00 | -3.00 | -5.00 | 1.00 | 1.00 | -3.00 | 1.00 |
| Aware | 2.00 | -2.00 | 1.00 | 2.00 | -2.00 | 1.00 | 1.00 | -2.00 | 2.00 | 2.00 | 1.00 | 2.00 |
| Troubled | 3.00 | -3.00 | 4.00 | 3.00 | -3.00 | 4.00 | -2.00 | 0.00 | 3.00 | 3.00 | -2.00 | 3.00 |
| Qualified | -1.00 | 2.00 | -4.00 | -1.00 | 1.00 | -4.00 | 2.00 | 0.00 | -1.00 | -1.00 | 2.00 | -1.00 |
| Need | -2.00 | -1.00 | -1.00 | -2.00 | -2.00 | -1.00 | -6.00 | -3.00 | -2.00 | -2.00 | -6.00 | -2.00 |
| Offer | -3.00 | 1.00 | 2.00 | -3.00 | 1.00 | 2.00 | 2.00 | -5.00 | -6.00 | -3.00 | 2.00 | -3.00 |
| Competition | 1.00 | 1.00 | 1.00 | 1.00 | 4.00 | 1.00 | -1.00 | 0.00 | -6.00 | -7.00 | -1.00 | 1.00 |
| Decision | -2.00 | -3.00 | -1.00 | -2.00 | -4.00 | -1.00 | 1.00 | 0.00 | -7.00 | -8.00 | -8.00 | -10.00 |
| Close | 2.00 | -2.00 | -3.00 | 2.00 | 1.00 | -3.00 | 1.00 | 0.00 | -7.00 | -10.00 | -11.00 | -11.00 |
| Deliver | 0.00 | 0.00 | 2.00 | 2.00 | 1.00 | 2.00 | -3.00 | 0.00 | -8.00 | -9.00 | -10.00 | -12.00 |

THAT'S AMAZING....

RevenueTEK 