Raising the Bar for Business CRM Solutions

equitytouch®

A Touch Ahead Software Product

Introduction

If you own or run a business, you know how important it is to manage the relationships you have with your business's internal and external stakeholder groups, and to ensure that no relationships turn sour because you failed to manage them well. So, how exactly does one manage their business relationships in a simple and effective way? The answer: CRM. An even better answer: EquityTouch – Touch Ahead Software's CRM solution for the alternative asset community.

Why is EquityTouch the ultimate business solution for the alternative asset community, and any other business for that matter? It's because our CRM SaaS solution offers a multitude of features and advantages that place it ahead of the competition. Our "gems" as we like to call them.

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About Touch Ahead Software

EquityTouch by Touch Ahead Software is the first SaaS-based, cutting edge CRM solution, built from the ground up specifically for the alternative asset community.

> **What is CRM?** CRM stands for customer relationship management, but at Touch Ahead, it's much more than that, because our clients use EquityTouch to enrich relationships surrounding deal making. For them, it's a matter of managing connections in order to capitalize on opportunities and make every interaction they have count.
>
> **What is SaaS?** SaaS stands for Software as a Service, meaning EquityTouch runs complete off the cloud – not a desktop – making it accessible to you anywhere, anytime. The Touch Ahead CRM application is hosted in secure data centers, so our experts handle all maintenance for the application and server, keeping your data safe. This means less work and lower costs for you.

EquityTouch uses the "Touch" concept to help organize the information flow of an organization. A Touch is any type of activity associated with your day-to-day process – all of the "personal touches" involved in the activity surrounding every deal. EquityTouch enables groups to collaborate and track events, emails, calls, meetings, and more, generating an inventory of Touches you can leverage through the deal cycle.

Because **our mission is to provide the fastest, most innovative web-based applications**, we are constantly pushing boundaries and redefining the software model. In a world where technology moves faster than the speed of light, raising the bar for better business CRM solutions puts our clients one *Touch ahead*.

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Simple Customization

First and foremost, the fundamental purpose of Touch Ahead Software is to develop an application that is intuitive and easy to manage for all of its users – because we realize all users approach software differently and use it for different purposes. This is why we've created our CRM interface to support multiple, customizable fields that can be tailored to the preferences of any and all users – while keeping the underlying data intact and robustly searchable.

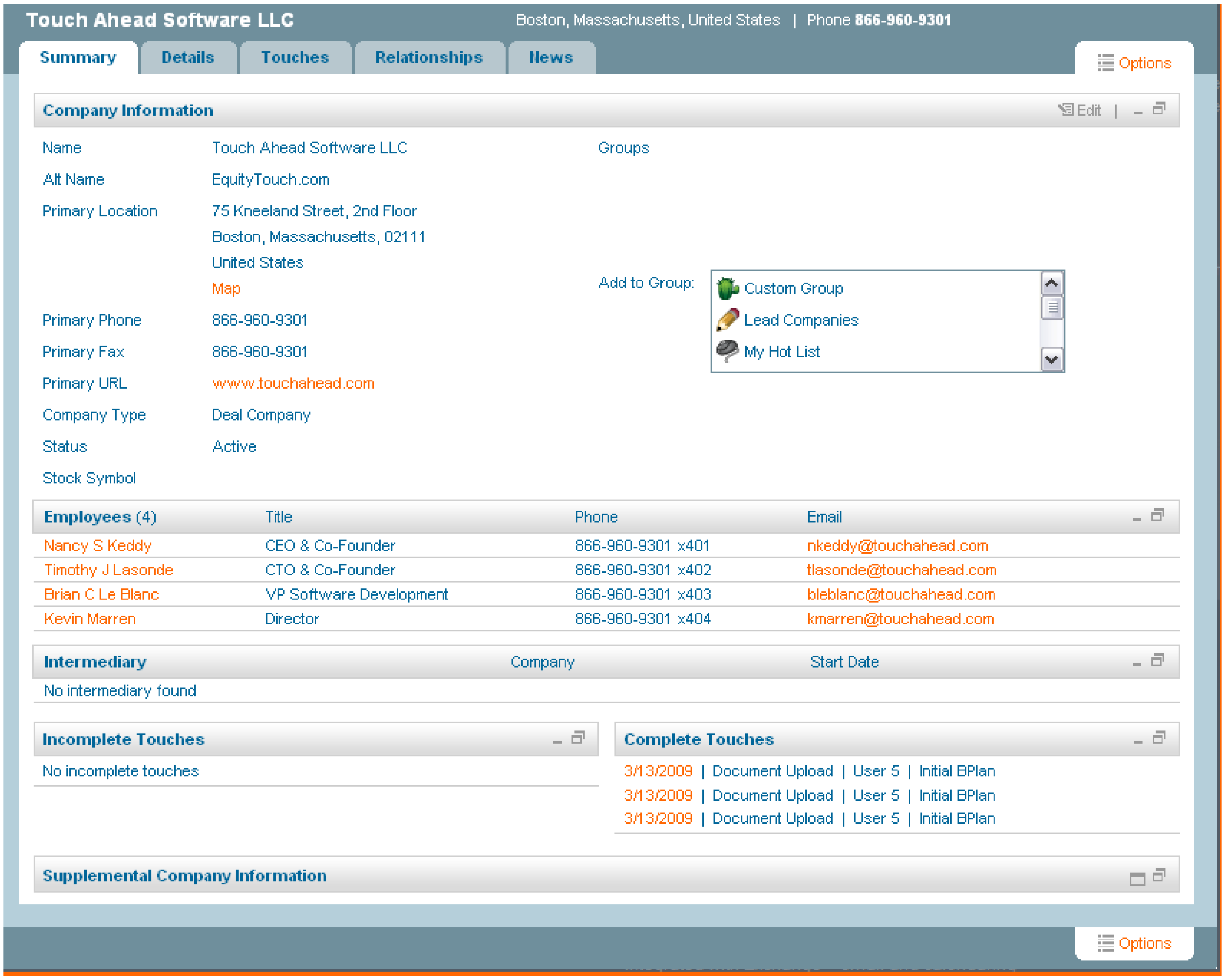
Depending on what a company is using a CRM to accomplish, one company's users will most likely need certain fields to be represented and searchable within the database different from another company's users. These custom fields are created in order to track and monitor relationships with stakeholders. For example, maybe your organization needs to create a list of all company contacts with revenues between X and Y amounts. Simply create a custom "Revenue" field and select "currency" as its type. After the custom field is created and information imported, all you or your colleagues have to do to find the set of information is a simple search and export. This can be done with any data field that is created. EquityTouch also allows you to hide fields you don't need – creating less clutter and a more usable interface. The hidden data remains completely searchable.

How does this differ from other CRMs? Other CRM software applications limit the amount of customizable fields a user can create, because most have only a certain number of applicable filters. This means that customizable field options including date, number, currency, memo and any other “you-name-it” fields aren’t possible – without expensive custom development costs.

For example, one popular use of custom fields is to track deals in the pipeline. Users can create fields to load, track and update information regarding potential ventures, their industry and the stage they’re in. This data can then be exported to create reports, which can be used to monitor growth and project future deals.

In addition to customizable data fields, EquityTouch offers a completely customizable interface with the ‘Drag and Drop’ feature. This allows users to create a layout that they can analyze efficiently and effectively. With priority information at the top and less important or supplementary information at the bottom (or however you or your colleagues choose to organize it), you’ve got a layout that works with you and helps your company move faster.

Intelligent Relationship Management



What are you using to organize all of your contacts and their corresponding companies? If you're stuck in the Stone Age and still use Excel spreadsheets, chances are every time you add a new contact you're adding every little piece of information about them to numerous columns – job title, company, phone, etc. If you're using a CRM with a "flat" database, you probably have to go through a similar process.

We know that you don't have time to import the same information over and over again for different data fields under the same parent company (e.g., same company info, different employees). This is why we've created Parent-Child Relationships, or Intelligent Relationship Management, a tool that allows users to create custom grids that organize easily-referenced points of contact within our CRM database.

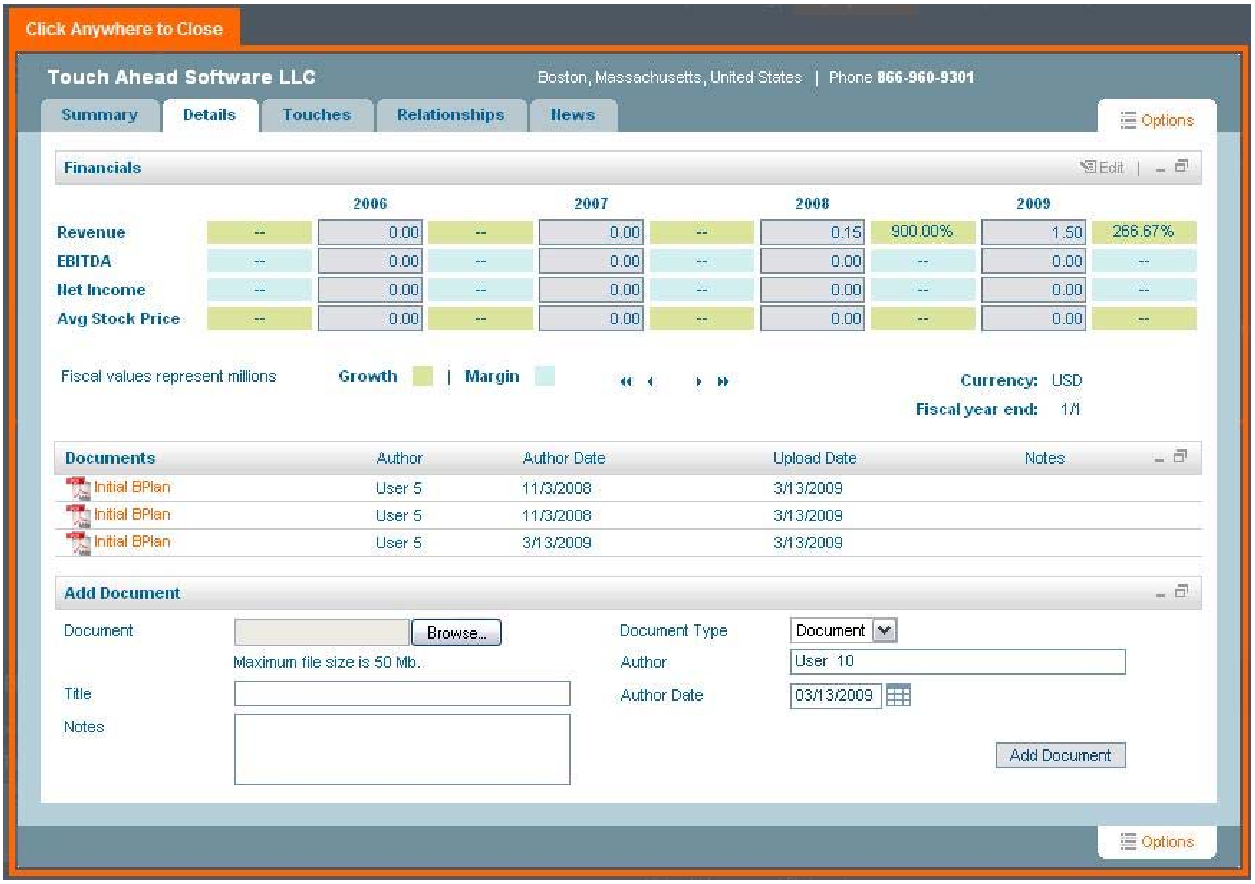
EquityTouch makes storing and retrieving company information simple. Any time you add a new employee to the database, you can easily add them to an existing company, creating a hierarchical table rather than a linear or flat database. This makes referencing information cleaner and more efficient. All information is stored under the parent company.

For example, if you're working with Company XYZ, you'll import the corresponding information about that company into EquityTouch, along with whatever contacts from Company XYZ you're working with. Any subsequent interaction you have with those employees will be stored as a Touch – with each employee that is part of an interaction included as a Participant.

Because of Intelligent Relationship Management, adding any employee to a Touch will result in their parent company being included as well. Now, access to that information is streamlined and simple. Conduct a "people search" on the person involved in a transaction and the resulting information will be included in that Touch. It will also be included on the company profile page in EquityTouch, meaning information is consistent across all pages.

This process cuts out multiple steps necessary with spreadsheets and some other CRMs. It keeps all of your data organized in a fashion that makes sense to you and your employees. And best of all, the information is available and searchable for all users, keeping everyone up to date and creating open lines of communication –an essential part of organizational success.

Ready-to-Run Reports



Keeping business contacts and relationships organized through Intelligent Relationship Management and having that information at your fingertips with Simple Customization tools are the first steps to seeing success. Now it's time to measure the impact of those interactions with Ready-to-Run reports.

Staying true to our mission to develop software that is intuitive and easy to manage, EquityTouch includes the Reports feature. This feature allows our CRM users to export reports based on the Touches they've so diligently been importing into the application day by day. Reports give employees a visual representation of the progress they are making as well as where there is room for improvement or change. Because EquityTouch caters to the private asset community, these ready-to-run reports are perfect for monitoring the progress being made with different deals or keeping track of business that could lead to potential deals.

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Using reports through the EquityTouch CRM is a great way to deal source by: keeping tabs on the user's network and trusted contacts; web scrubbing social media and industry sites for insight on the latest game-changers; and tracking any interactions a company may have with entrepreneurs or other business contacts that may be looking to strike a deal. We understand you are busy, so having a tool that readily exports this data into an intelligible Excel, Word or PDF file to analyze your deals will help you make more informed business decisions.

Part of what makes a business great is its ability to look at the past and use that information to shrewdly calculate future business. For the alternative asset community, we've coined the term "Deal Forecasting" for this – predicting the number and size of future deals you expect to make and the subsequent cash flow and levels of production based on that information. With EquityTouch reports, you can evaluate current and past deals and cash flow, and use that data to determine what future deals may look like, areas of business you should alter, improve or expand upon, and more.

EquityTouch Reports support the vast majority of alternative asset CRM needs because they pull a massive amount of data into one comprehensive report in a format that works best for you. And if you can't find the specific report you need, we'll design a custom report tailored to your precise needs.

Superior Fast Searching

At Touch Ahead, we pride ourselves on knowing how our clients operate in order to design a CRM solution that addresses all of their needs – and they operate fast. In a rapidly changing, fast-paced industry – and world – businesses need software and tools that move at their speed, so we created EquityTouch with Superior Fast Searching.

Our Superior Fast Searching feature not only gives you immediate and easy access to your information, but also provides robust data searches, with customizable fields, saved searches, “Distance-From” searching and “Look Ahead” searching.

At Touch Ahead, our philosophy is about understanding you and your business, which is why we created Simple Customization – to cater to your business’s specific needs. However, this feature would be nothing without the EquityTouch search component. Our superior searching allows you to create the fields you need – and get rid of the ones you don’t – making whatever data you import into custom fields immediately searchable. No expensive custom filters necessary.

Taking a cue from the biggest search engine in the world, EquityTouch offers “Look Ahead” searching. Like Google, it generates a list of associated items based on the first few characters of your search, creating less work and saving you time. Plus, we know the importance of incorporating tools you already use every day – making our CRM familiar to you before you’ve ever even used it.

For many companies, especially in the alternative asset industry, traveling is part of the job; so if you’re going on a business trip, take advantage! Network with business contacts in the area you’re traveling to. The best way to get started: “Distance From” searching. This EquityTouch search feature allows users to conduct a search on all of their contacts within a certain radius of your destination, apply any other criteria, create a search or a group and export the results – so you have a targeted list of who to contact in the area. Having instant access to this list – without having to scrub your memory for which of your contacts works where – allows you to develop deeper, more personal relationships with all of the people you do business with.

> *Communication within any organization is vital to its survival – so we made our searches savable and sharable. If you conduct a search with any given amount of criteria, you are able to save the results as a search or as a group (for example, “Key People” or “Hot Prospects”), and then share that search or group with your coworkers, keeping all employees up to date and in the know. In addition, saving your search makes it easy for you to pick up right where you left off, without losing information or needing to start your search all over again.

Having a robust search engine with multiple elements makes it easy for EquityTouch users to achieve the business results they’re looking for. (Kind of salesy)

Unbeatable Client Support

At Touch Ahead Software, we take pride not only in the business solutions we create and the advancements we make through technology, but also in what our clients are able to accomplish through the CRM software we design. We believe in maintaining positive and long-lasting relationships with all of the companies we do business with, and a huge part of that mission relies on providing unbeatable client support.

We've crafted a web-based CRM solution that allows companies in the alternative asset community to enhance their businesses through detailed tracking and measuring of internal and external interactions. In order to achieve this, the Touch Ahead team of developers coded, engineered and designed a complex web application that is packaged in a simple user interface anyone in the industry can use. Our clients aren't in the business of computer science – we are – and we're here to assist on all things CRM. "Your business is our business" as they say, so tailoring EquityTouch to our clients' specific needs and assisting them with issues, questions, concerns and more is standard practice at Touch Ahead.

CRM systems won't work without adhering to the best practices for your CRM strategy, a fact we use to our advantage. At Touch Ahead, we value the importance of employee buy-in, and the first step to attaining that is making sure all employees at our clients' companies fully understand how the system works and how they can easily utilize it to improve business and ease the daily work process. To us, it's not a matter of using the commands correctly – it's showing you how to get the most from EquityTouch and optimizing your solution in order to improve deal-making practices.

No one likes waiting on the virtual telephone line, going through layers and layers of computer generated touch-tone responses before ever hearing a human voice. When you work with Touch Ahead, you deal directly with us – simply pick up the phone and talk to an expert (AKA one of the people who was actually involved in the design of the application you’re working with) about whatever issue or question you have. Prefer email? That’s fine – send us one and you’ll promptly hear back from a real person.

Because the initial design from which EquityTouch has been growing since 2008 was founded by Nancy Keddy, a 20-year veteran of both the alternative asset and IT industries, and NSK Inc’s chief technologist Timothy Lasonde, user support is grounded in a deep understanding of both our clients’ and our industries. It can be frustrating to feel like a number or a source of revenue, but not at Touch Ahead. We understand the issues surrounding deal collaboration CRM, and it’s that understanding that helps bridge the gap from application to business making.

Whether it’s assisting employees through the transition into EquityTouch, addressing any and all concerns on a daily basis, or helping find new ways to maximize business’ potential through our CRM, Touch Ahead provides matchless support for all of your firm’s needs.

The Bells and Whistles

Multitasking: The ability to concurrently work on multiple projects is quickly becoming the norm in many businesses – especially alternative asset firms. EquityTouch allows users to search, view and update company or contact information in one Touch while you create another Touch with the "Fly-Out" viewing screen. Users can also create new data entries (like contacts or companies) while working on a touch – saving time and avoiding the risk of losing your project.

Integrated with Microsoft Outlook Exchange: Using multiple programs for different tasks can lead to disjointed communication and lost opportunities – but not with EquityTouch. Our CRM is fully integrated with Microsoft Outlook Exchange, so all of your emails, calendar events and contacts can easily be transferred into the EquityTouch database. This saves time, avoids redundancy, reduces data entry and eliminates potential errors.

Web Service Integration: Save time and avoid data entry by importing information directly from web services and social media sites into EquityTouch with intelligent data scrubbing. Stay up to date on the key players involved in deals by associating contacts to LinkedIn profiles. Search Google, Twitter and Yahoo directly from EquityTouch.

Statistics: EquityTouch analyzes the characteristics of each interaction through Statistics. Statistics track who is contacting whom, how, frequency and results, and are updated dynamically. This allows users to gauge how often they should be communicating with business contacts and discover new methods of interacting in order to improve results. Touches, which track these interactions, are sorted by type and linked to the dynamic data results.

Document Management: Easily share information with key people through Document Management. The ability to upload relevant documents into EquityTouch lets you view all pertinent information for a business transaction in one organized place.

Keyboard Shortcuts: Everyone loves a shortcut, so we've designed keyboarding shortcuts for EquityTouch that let you easily and efficiently work through the CRM with fewer clicks of the mouse. And with training and implementation support from the Touch Ahead team, your fingers will know the EquityTouch keyboard slang in no time!