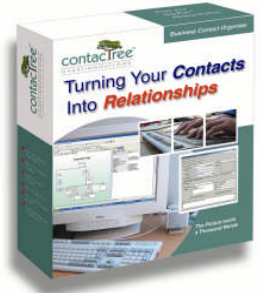


Charting

Understanding the teams that generate, convert, and deliver, profitable sales opportunities



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"Improve your Outlook®"

NUMBER 8

ContactTree Seeking new Partner Recovers IP from Licensee

Failure to meet license terms

Data Perspective Ltd (DPL) and ContactTree Ltd (CTL) have terminated their license agreement. CTL Chairman David Davidson says "the relationship with DPL that looked so attractive last year has never returned what it promised, but the product has too great a potential to let slip. We are disappointed in the loss of this particular opportunity. We shall now be looking for new partners to help us take forward our unique contact management technology".

What sort of Partner?

"There are so many directions that we could take ContactTree™ if we had the resources", said Davidson, "apart from its proven merit in daily use as an enhancement to Outlook, it offers a unique 'pre-CRM' capability for the management of all the ephemeral and peripheral leads that take you ultimately to solid Customers; or as a stand-alone utility for lead and opportunity management".

"We are talking with several interested parties, ranging from suppliers of CRM bespoke implementations, marketing consultants with an interest in using ContactTree™ to give them a special edge in their work, finance consultants with access to private equity investors, to ISVs whose

IP position would be strengthened by CTL's patents. I am hoping that we will be able to keep control of CTL, but it's most important that this project, which won grant support from DTI, finds the resources it deserves".

Unique Relationship Selling tools

This move has come at a critical point in development of SharePoint functionality. SharePoint Consultant Jason Smyth said, "It is a real disappointment not to be working with DPL on what looks to me like a truly unique application. I have many clients in the City who would give their eye-teeth for a global implementation of a tool like this. They are really into 'relationship selling' and there is simply nothing else out there that does what ContactTree does. I hope that we will have an opportunity to get the project back on the road."

'Missing link' between Outlook and CRM

ContactTree is designed for situations where the simple Address Book is not clever enough, and CRM too inflexible. "In all my years in Sales & Marketing I have never found anything that fit this niche in the Market for Contact Management tools to support the process of selling complex propositions to large organisations" said Gordon Roxon, Director Audenca Ltd.

Why ContactTree™ is so important and unique? Gives you the competitive edge in Prospecting

Anyone who has ever been to an important Customer meeting and arrived not knowing anyone in the room will understand the power; the power not only of the pictorial view of who does what, but of the processes that lie behind the generation of such information. With the OrgChart you have a

head's start, even if you have to send someone in your place. This makes ContactTree™ an indispensable tool when you are selling a complex proposition to large organisations. You can keep one step ahead of your competitor using the full power of the Outlook records of you and your team.

So what is special about ContactTree™?

Charting & sharing processes covered by US Patent Applications

Relationship Selling in Outlook

Successful Relationship Selling relies not just on knowing the individual who has the need for your product, but each individual who influences and implements the buying decision. The better you understand these relationships, the more advantage you will have over your competitor. ContactTree codifies a 'pre-CRM' process in Outlook, but could be applicable within CRM applications.

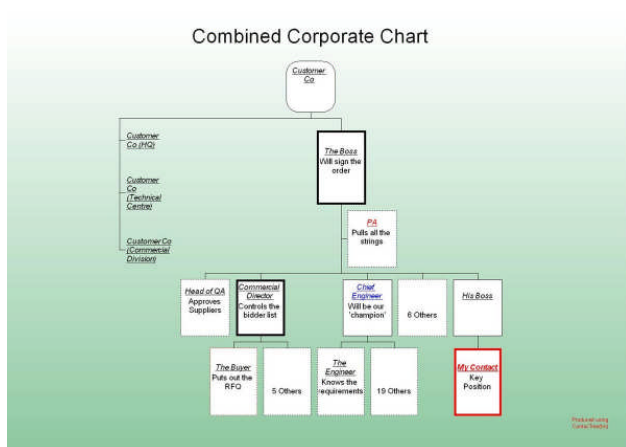
Flexible record creation short-cuts

Short-cut input and Axelerator™ forms are an integral element of all ContactTree™ implementations. ContactTree™ uses native Outlook functionality to group Contacts by Company and by Location. It also provides the fundamental ability to link together related records.



Charting hierarchic structure

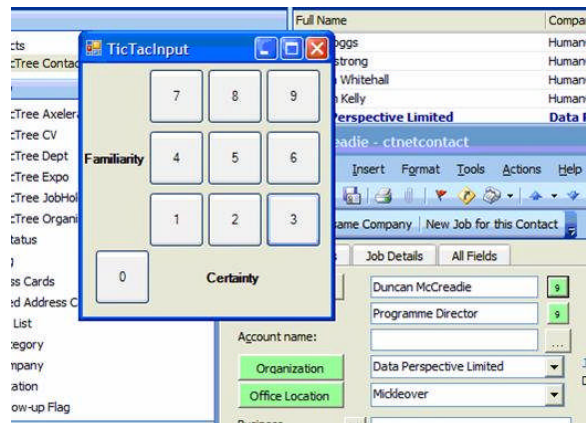
This linkage functionality facilitates the understanding of hierarchic (Manager) relationships, from which ContactTree™ will automatically generate the Customer OrgCharts that enable you to display all the people who are important to you.



Subjective Contact information

Not all Contact information is of equal value or certainty. With the growth of electronic information available, it is vital to distinguish, say, between someone whom you know well and someone who may be more important, but is not so well known to you. ContactTree™ TickTac™ boxes facilitate the rapid and intuitive capture of your

views. This information may be graphically and colour encoded in the output OrgChart so that you can see at a glance what this means to you.



Team-sharing of subjective information

While the encoding of subjective views may be important for your own use, it is absolutely vital when it comes to a sales team needing to share and combine their collective knowledge. ContactTree™ scoring provides the ability to automate the combination process. Now you can create a 'best view' OrgChart, using the highest-rated information, as well as seeing at a glance who is most important, and who in your team provides the best connection.

Opportunity Prospecting

ContactTree™ caters intrinsically for Contact-driven opportunities. Many of the techniques can also be used to capture subjective Opportunity information, such as Disposition, Elasticity, Strategic Fit etc., as well as Value and Probability. Addition of this sophisticated Opportunity functionality is in the early stage of implementation. Automatic generation of a fully encoded graphic Sales Funnel is the end-point.

Platforms

The current ContactTree™ utility that is available for download from the Website is compatible with Outlook 2000-2002. A version in Outlook 2003/XP is available for custom installation, complete with Subjective Scoring. Full Outlook 2007/Vista functionality has been demonstrated and sharing implementations can be demonstrated and supplied in WSS3.