

## xCatalyst™ Relationship Management System

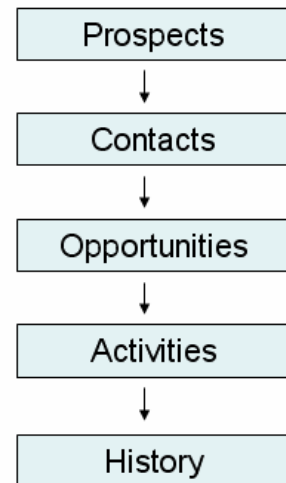
*Collaboratively Manage Relationships Important to Your Organization.*

### *Everything You Need to Effectively Manage Critical Relationships*

Introducing the xCatalyst Relationship Management System (RMS). This web-based system is designed to allow you to manage your day-to-day business relationships. The RMS provides anytime/anywhere access to critical information and relationship history using any web browser.

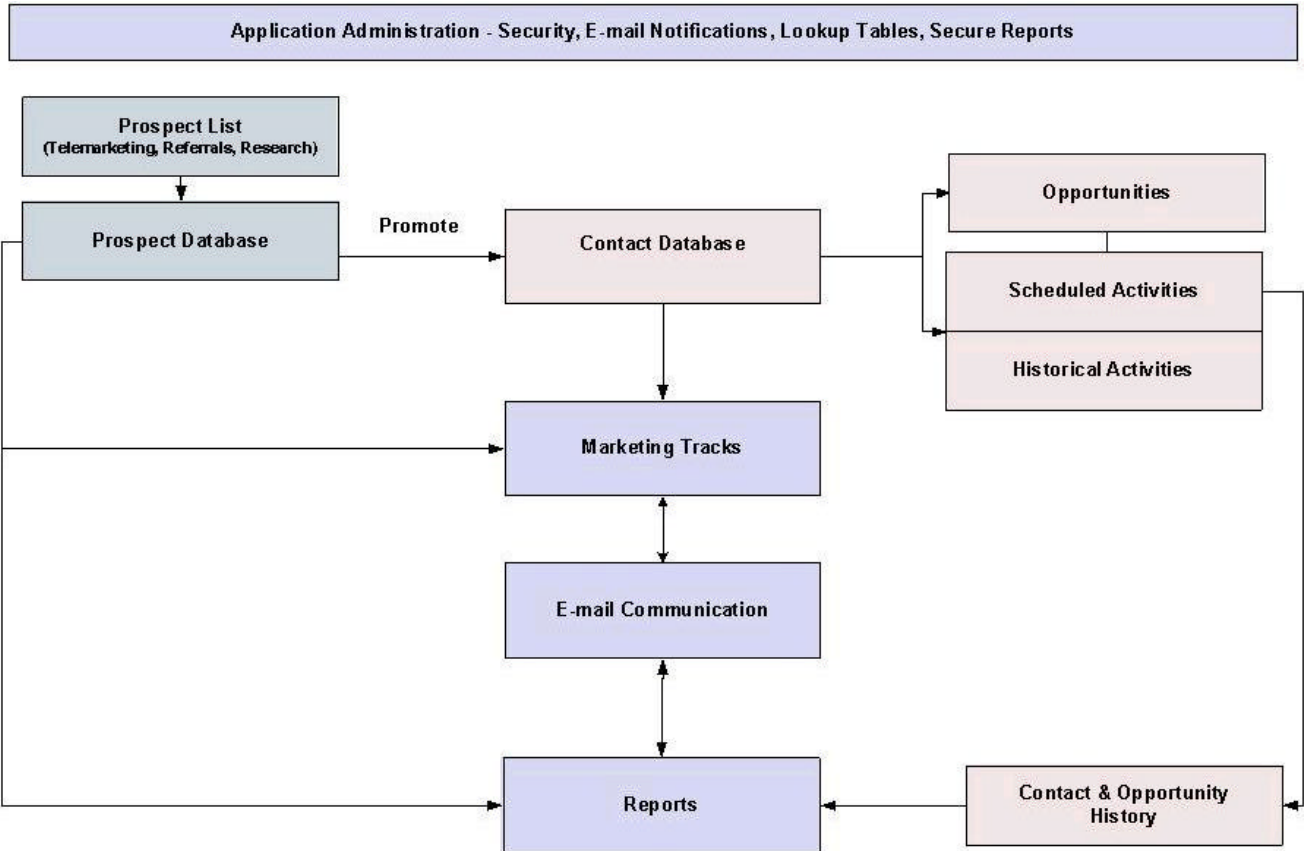
Using the RMS will help build and maintain the critical relationships common to all organizations. The RMS automates the following key areas of relationship management:

- ❖ Allows collaborative relationship management. Eliminate information silos.
  - ❖ Streamline business development through automated and consistent workflow that you define.
  - ❖ Granular RMS user privileges enable you to keep secure information confidential, yet provide public information to people who need it.
  - ❖ Manage company, prospect and contact information from an intuitive and easy to use web application.
  - ❖ Track an individual's contact history independent of changing company relationships.
  - ❖ Automatically promote prospects to contacts without additional data entry.
  - ❖ Track and close sales consistently by automating process workflow.
  - ❖ Track telemarketing call activity.
  - ❖ View xCatalyst website membership information with a click of your mouse.
- ❖ Point and click reports give you instant access to critical information. Ad Hoc reporting when you need it, complete with data export to Microsoft Word and Excel.
  - ❖ Manage an unlimited number of opportunities for each contact. Track individual opportunity history.
  - ❖ Manage contact, opportunity, scheduled and historical activities. Share this information with your work group. Avoid embarrassing knowledge gaps.
  - ❖ Point and click relationship history so people work together and stay informed.
  - ❖ Send e-mail communications to prospects or contacts then track click-through responses. Responses become part of a prospect or contacts history.
  - ❖ Route activities and opportunities to the right people for resolution, escalation or reassignment.



RMS Collaborative Workflow

## xCatalyst Relationship Management System Overview



- Prospects – Individuals without identified opportunities
- Contact – Individuals with identified opportunities

## RMS Table Relationships

