MOSAICCRM



# Account Retention and New Customer Acquisition: The Total Management Process

In today's ultra competitive marketplace, seemingly everyone is chasing your customer and new ones are hard to find. Maximizing Account Retention and New Customer Acquisition is normally a hugely complex affair. Not so with MosaicCRM: our programs do all the heavy lifting with processes that sales and management can easily follow and get results.


Because of this fact, the sales process needs to be more strategic than ever before. Not just to get the client, but also to retain existing customers and predictably manage your resources.

**Learn how Mosaic CRM's 360° Account Management processes make all the difference.**

# Mosaic CRM changes the game plan from simple 'recording' to fully automated support and mentoring.

There is nothing like a recession to refocus 'budget friendly' sales efforts on customer retention. It's no surprise that it costs a fraction to maintain an existing account as does it to acquire one. However, new customer acquisition still remains a fundamental value to every business regardless of the economic conditions. Due to the rarity of these in hard economic times; lead management has never been more critical or important.

Unfortunately most CRM technology is too often configured to basic record keeping of the interactions with existing accounts and new customer leads. With this type of CRM set up, it becomes increasingly problematic to gain a high degree of visibility of what keeps existing customers happy and closing net new account opportunities.

Total Account Management: For the vast majority of salespeople, understanding the customer buying cycle and managing their efforts is the single biggest factor in gaining more ground. MosaicCRM makes managing Pipeline and Sales/Business Reports a relatively simple procedure, with only the barest of Account and Opportunity data fields. Add MosaicCRM's 'Automated Account Monitoring' to deliver a host of alerts, emails and activity scheduling tools that emphasize Client and Opportunity development.

## It all starts with what Mosaic CRM does in the background.

Key Analytics and automated monitors do all the heavy lifting to understand and predictably manage your resources:

- **Simultaneously** monitor key activity dates: Closing, Revenue Start and Expiry Dates
- Scheduled activities and objectives that match the **Client Buying Cycles**
- Denote **Who** is buying
- Define **What** they're buying
- Quantify **How Much** they're buying in $ and Unit volume
- Track the **Stage/Gate** progress by client defined criteria
- Analyze the **Competition**: tracking what they are doing
- **New Leads/ New Accounts / Key Accounts** tracking and monitoring
- **Conversion Ratios,** W**in/Loss Analysis**
- Strategic and timely **Activity monitoring**

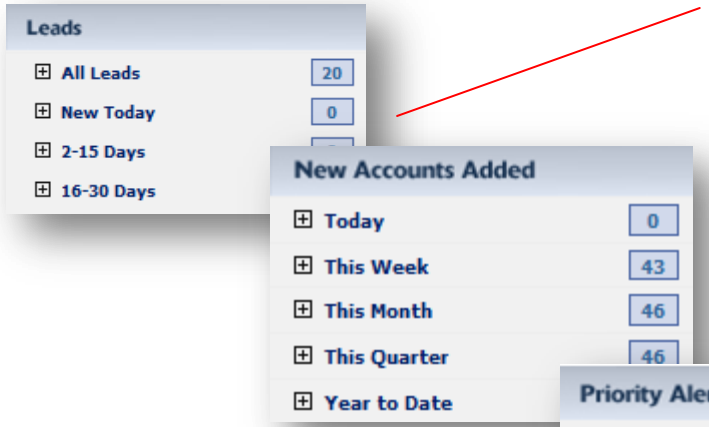
Up to 65% of all sales efforts require identifying, qualifying and tracking Sales Opportunities.

This is where MosaicCRM's custom designed management systems can really make a difference: time can now be dedicated to more effective production.

## New Leads Management

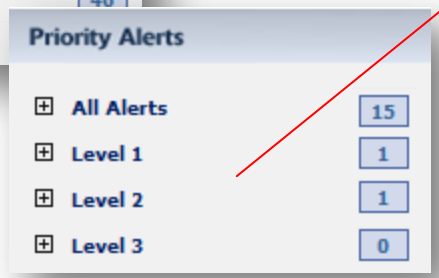
Simply put, lead management is all about turning a prospect into a customer. The 'simple' ends here as there is nothing simple at all about the process. Poorly qualified leads, impatience, lack of a nurturing strategy and a host of issues compound to kill new account acquisition/lead progress and in turn flushes tons of money down the drain. Like many CRM programs, tracking the sales process through the sale stages is routine and not very practical in terms of deploying an effective strategy and process for qualification, appropriateness, or nurturing.

**Here's how we do it with a high visibility of the 'relationship' process from the start:**




### Leads – New Accounts Monitor

In addition to the email notifications, each time you log in the Leads and New Accounts Monitor keeps track of how many, and when.
Great for assisting in lead distribution, timing, aging and more.




### Alerts

Throughout the system, Leads and New Accounts without updates, scheduled activities and progress are monitored in Priority Alerts campaigns designed to keep the focus on what's next and when.


### Tracking Begins Instantly

As soon a lead is entered into the system, it is tracked for up to one year.

Nothing escapes the tracking system: activities, sales opportunities, transfers, everything that can affect the Accounts/Leads are monitored.

## Account Retention-Keep Your Competition at Bay

Successful businesses understand the lifetime value of a customer. Just because it is 20-30% of the cost of acquiring a new customer, that doesn't mean you or your CRM can relax. Every competitor is looking at your customer base so being able to identify Key Accounts and track them through the sales system is vital to keep your competition at bay.


### Monitoring What Isn't There

MosaicCRM adds a new twist to the Lead Monitoring equation: we monitor what is not present e.g. a Scheduled Activity.

***If none exists, the program will automatically schedule an Activity and notify the Owner.***

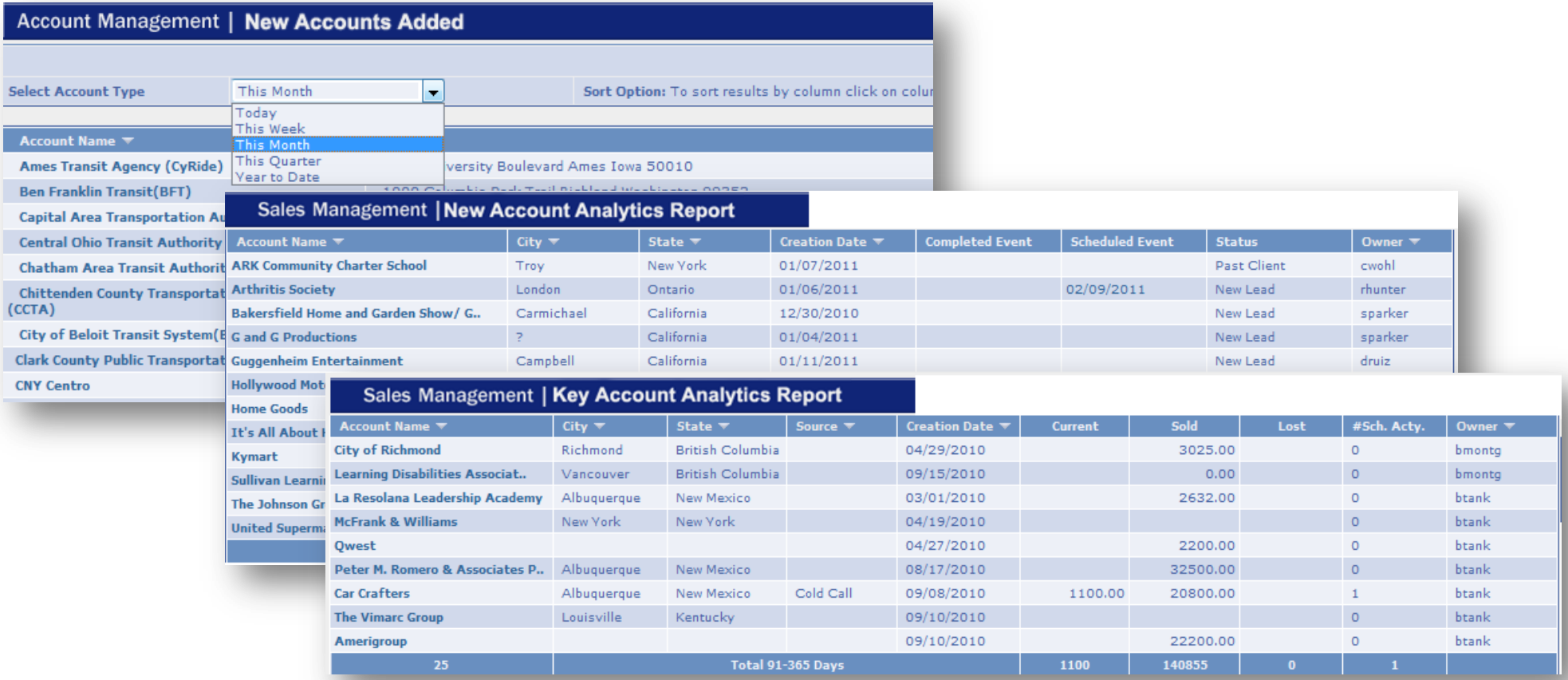
### Account Nurturing

MosaicCRM tracks every Lead and New Account through the entire sales cycle. For the first 90 days, action is critical and we arm your CRM to alert the Owner on progress or the lack thereof.

***Mosaic's Marvel Marketing Wizard is a multi-customer touch program that ensures the Lead/Account management process is maintained.***

## MosaicCRM Makes 'Visibility' of Account Sales and Activities the Prime Objective.

Nothing happens unless something happens so it goes that tracking New/Key Account activity on a daily basis makes a lot of sense. Mosaic adds the benefit of advising the account owner where they don't have scheduled activities and automatically schedules the appropriate activity. As well, stalls in the sales stages are remedied with email notifications and automatically scheduled priority activity based on the stage/progress monitor time frame selected.



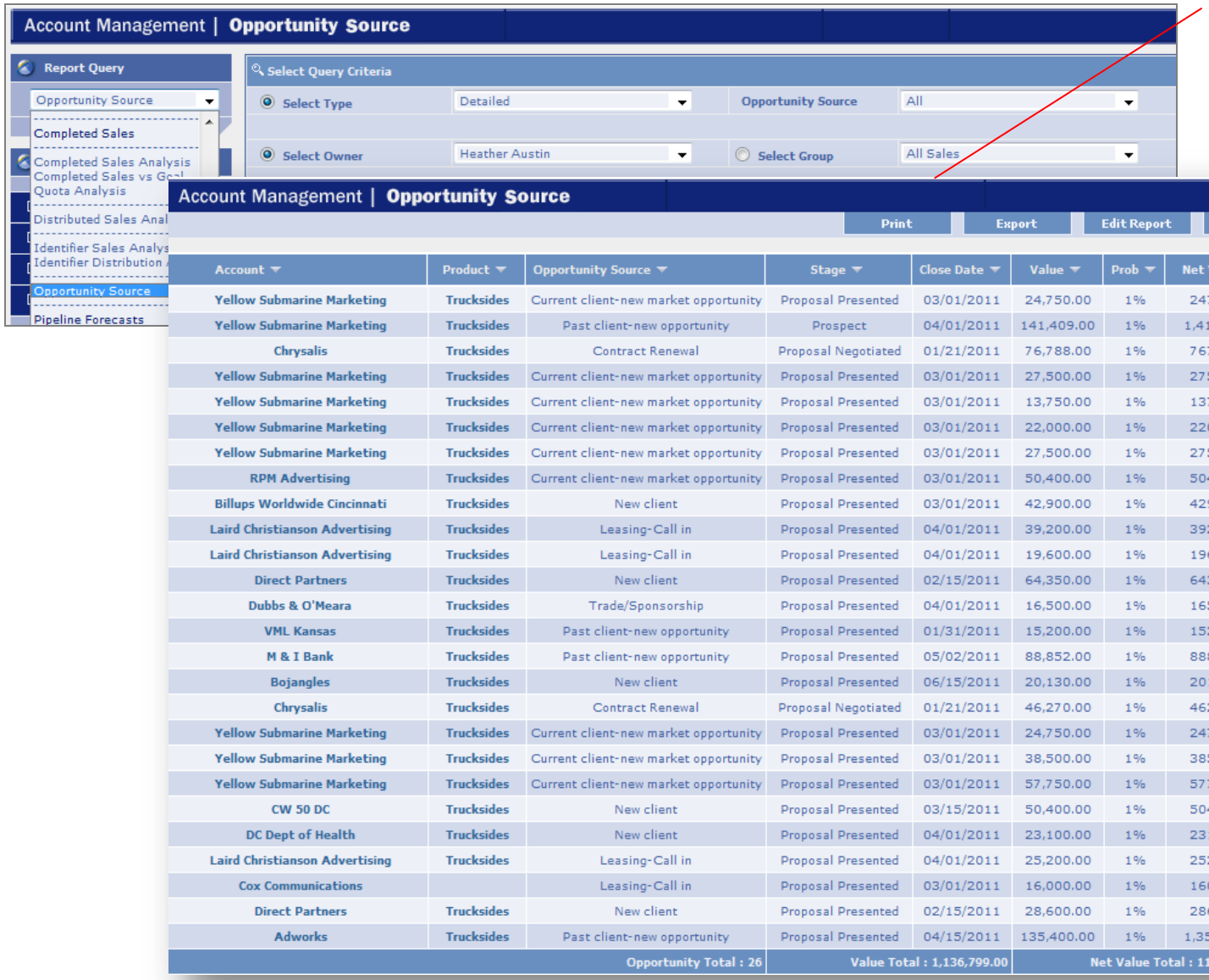

| Account Name | City | State | Creation Date | Completed Event | Scheduled Event | Status | Owner |
|---|---|---|---|---|---|---|---|
| ARK Community Charter School | Troy | New York | 01/07/2011 | | | Past Client | cwohl |
| Arthritis Society | London | Ontario | 01/06/2011 | | 02/09/2011 | New Lead | rhunter |
| Bakersfield Home and Garden Show/ G.. | Carmichael | California | 12/30/2010 | | | New Lead | sparker |
| G and G Productions | ? | California | 01/04/2011 | | | New Lead | sparker |
| Guggenheim Entertainment | Campbell | California | 01/11/2011 | | | New Lead | druiz |

| Account Name | City | State | Source | Creation Date | Current | Sold | Lost | #Sch. Acty. | Owner |
|---|---|---|---|---|---|---|---|---|---|
| City of Richmond | Richmond | British Columbia | | 04/29/2010 | | 3025.00 | | 0 | bmontg |
| Learning Disabilities Associat.. | Vancouver | British Columbia | | 09/15/2010 | | 0.00 | | 0 | bmontg |
| La Resolana Leadership Academy | Albuquerque | New Mexico | | 03/01/2010 | | 2632.00 | | 0 | btank |
| McFrank & Williams | New York | New York | | 04/19/2010 | | | | 0 | btank |
| Qwest | | | | 04/27/2010 | | 2200.00 | | 0 | btank |
| Peter M. Romero & Associates P.. | Albuquerque | New Mexico | | 08/17/2010 | | 32500.00 | | 0 | btank |
| Car Crafters | Albuquerque | New Mexico | Cold Call | 09/08/2010 | 1100.00 | 20800.00 | | 1 | btank |
| The Vimarc Group | Louisville | Kentucky | | 09/10/2010 | | | | 0 | btank |
| Amerigroup | | | | 09/10/2010 | | 22200.00 | | 0 | btank |
| 25 | Total 91-365 Days | | | | 1100 | 140855 | 0 | 1 | |

# Identifying & Supporting Account Acquisition/Retention

MosaicCRM brings a number of tools to your disposal in order to identify what is working best and making sure none of the gaps are missed.

## Opportunity Source Analytics




| Account | Product | Opportunity Source | Stage | Close Date | Value | Prob | Net Value | Owner |
|---|---|---|---|---|---|---|---|---|
| Yellow Submarine Marketing | Trucksides | Current client-new market opportunity | Proposal Presented | 03/01/2011 | 24,750.00 | 1% | 247.50 | bgreskowiak |
| Yellow Submarine Marketing | Trucksides | Past client-new opportunity | Prospect | 04/01/2011 | 141,409.00 | 1% | 1,414.09 | bgreskowiak |
| Chrysalis | Trucksides | Contract Renewal | Proposal Negotiated | 01/21/2011 | 76,788.00 | 1% | 767.88 | bgreskowiak |
| Yellow Submarine Marketing | Trucksides | Current client-new market opportunity | Proposal Presented | 03/01/2011 | 27,500.00 | 1% | 275.00 | bgreskowiak |
| Yellow Submarine Marketing | Trucksides | Current client-new market opportunity | Proposal Presented | 03/01/2011 | 13,750.00 | 1% | 137.50 | bgreskowiak |
| Yellow Submarine Marketing | Trucksides | Current client-new market opportunity | Proposal Presented | 03/01/2011 | 22,000.00 | 1% | 220.00 | bgreskowiak |
| Yellow Submarine Marketing | Trucksides | Current client-new market opportunity | Proposal Presented | 03/01/2011 | 27,500.00 | 1% | 275.00 | bgreskowiak |
| RPM Advertising | Trucksides | Current client-new market opportunity | Proposal Presented | 03/01/2011 | 50,400.00 | 1% | 504.00 | bgreskowiak |
| Billups Worldwide Cincinnati | Trucksides | New client | Proposal Presented | 03/01/2011 | 42,900.00 | 1% | 429.00 | bgreskowiak |
| Laird Christianson Advertising | Trucksides | Leasing-Call in | Proposal Presented | 04/01/2011 | 39,200.00 | 1% | 392.00 | bgreskowiak |
| Laird Christianson Advertising | Trucksides | Leasing-Call in | Proposal Presented | 04/01/2011 | 19,600.00 | 1% | 196.00 | bgreskowiak |
| Direct Partners | Trucksides | New client | Proposal Presented | 02/15/2011 | 64,350.00 | 1% | 643.50 | bgreskowiak |
| Dubbs & O'Meara | Trucksides | Trade/Sponsorship | Proposal Presented | 04/01/2011 | 16,500.00 | 1% | 165.00 | bgreskowiak |
| VML Kansas | Trucksides | Past client-new opportunity | Proposal Presented | 01/31/2011 | 15,200.00 | 1% | 152.00 | bgreskowiak |
| M & I Bank | Trucksides | Past client-new opportunity | Proposal Presented | 05/02/2011 | 88,852.00 | 1% | 888.52 | bgreskowiak |
| Bojangles | Trucksides | New client | Proposal Presented | 06/15/2011 | 20,130.00 | 1% | 201.30 | bgreskowiak |
| Chrysalis | Trucksides | Contract Renewal | Proposal Negotiated | 01/21/2011 | 46,270.00 | 1% | 462.70 | bgreskowiak |
| Yellow Submarine Marketing | Trucksides | Current client-new market opportunity | Proposal Presented | 03/01/2011 | 24,750.00 | 1% | 247.50 | bgreskowiak |
| Yellow Submarine Marketing | Trucksides | Current client-new market opportunity | Proposal Presented | 03/01/2011 | 38,500.00 | 1% | 385.00 | bgreskowiak |
| Yellow Submarine Marketing | Trucksides | Current client-new market opportunity | Proposal Presented | 03/01/2011 | 57,750.00 | 1% | 577.50 | bgreskowiak |
| CW 50 DC | Trucksides | New client | Proposal Presented | 03/15/2011 | 50,400.00 | 1% | 504.00 | bgreskowiak |
| DC Dept of Health | Trucksides | New client | Proposal Presented | 04/01/2011 | 23,100.00 | 1% | 231.00 | bgreskowiak |
| Laird Christianson Advertising | Trucksides | Leasing-Call in | Proposal Presented | 04/01/2011 | 25,200.00 | 1% | 252.00 | bgreskowiak |
| Cox Communications | | Leasing-Call in | Proposal Presented | 03/01/2011 | 16,000.00 | 1% | 160.00 | bgreskowiak |
| Direct Partners | Trucksides | New client | Proposal Presented | 02/15/2011 | 28,600.00 | 1% | 286.00 | bgreskowiak |
| Adworks | Trucksides | Past client-new opportunity | Proposal Presented | 04/15/2011 | 135,400.00 | 1% | 1,354.00 | bgreskowiak |
| | | Opportunity Total : 26 | Value Total : 1,136,799.00 | | | | Net Value Total : 11,367.99 | |

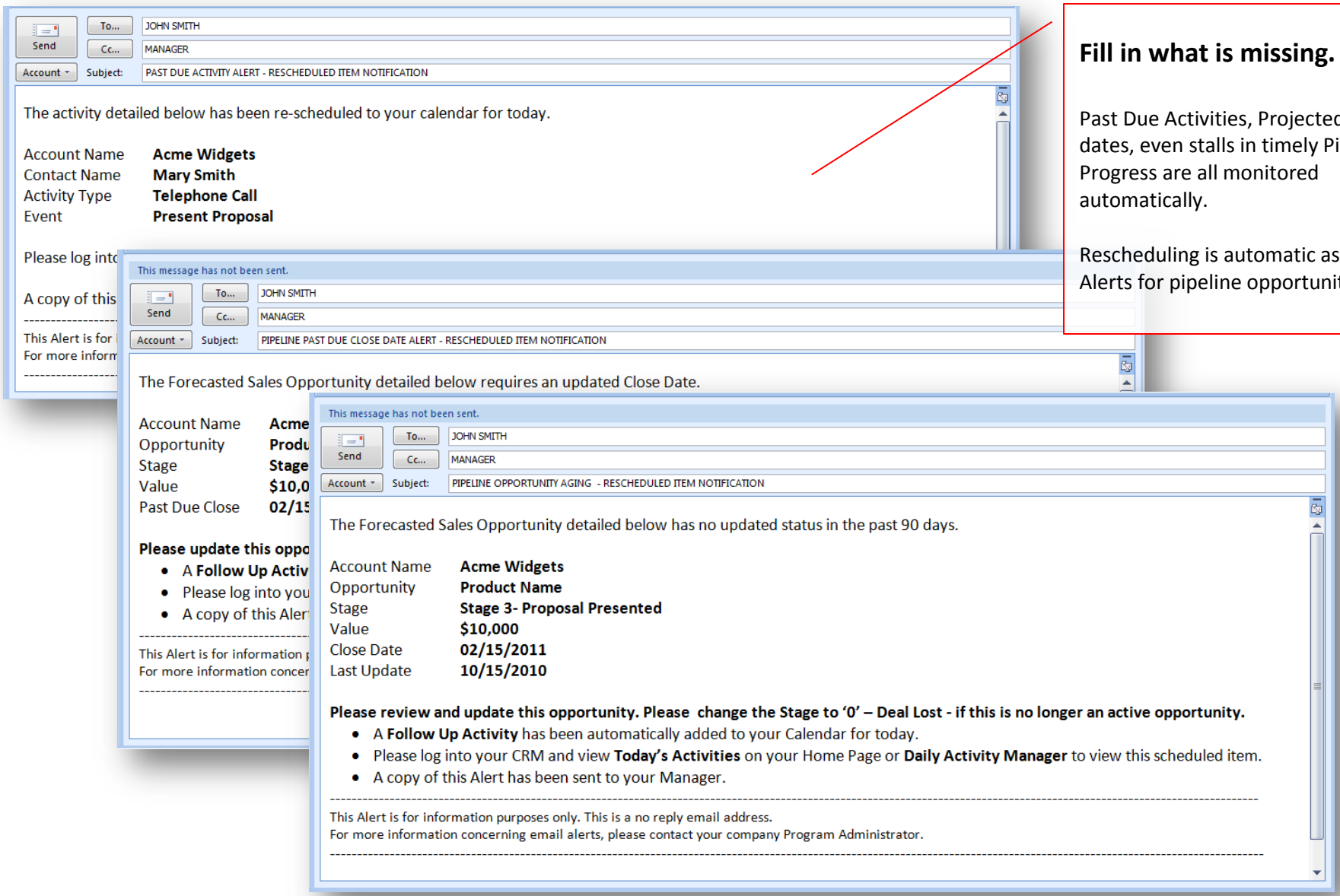
### Monitoring what's driving Opportunities

Monitor the source of where each pipeline opportunity originated. With the Report Configuration tools, you can pinpoint any number of variables by User, Group, Time and Source.

The results illustrate the origination and progress through the sales stages and the associated sales value and forecasted close dates

## Automated 'Account Monitoring and Alert' Program

It is sometimes too easy to forget an appointment or miss a closing opportunity. MosaicCRM provides an automated method to alert Users of changes required to their Pipeline, Account and Scheduled Activity items. The Account Monitoring Alert process covers essential messages and automatically notifies the Owner and reschedules these items together with an email update to the User's Direct Manager. This program is scheduled on a weekly or bi-monthly basis.




### Fill in what is missing.

Past Due Activities, Projected Close dates, even stalls in timely Pipeline Progress are all monitored automatically.

Rescheduling is automatic as is Priority Alerts for pipeline opportunity changes.

# Completed Sales vs. Goal System

## High Visibility Pipeline: Know what is sold vs. plan and what is in the pipeline.

Our exclusive Revenue 'Distribution' calculation design is a standard feature on all MosaicCRM systems and provides ultra accurate projection analysis of both completed sales and pipeline/projected sales values.

**Sales Management | Completed Sales VS Goal Results**

Jump To | Heather Austin

Report Query Results

Opportunities For: All Sales
Type: Basic, Detailed Report
Time Period: All

| Distributed Sales $ | January | February | March | April | May | June | July | August | September | October | November | December | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Closed Sales | 379066 | 160743 | 368713 | 447255 | 229672 | 290062 | 364384 | 207142 | 145661 | 229311 | 66218 | | |
| Goal | 120000 | 55000 | 85000 | 165000 | 165000 | 165000 | 165000 | 165000 | 165000 | 90000 | 80000 | 80000 | 1500000 |
| Month Variance | 259066 | 105743 | 283713 | 282255 | 64672 | 125062 | 199384 | 42142 | -19339 | 139311 | -13782 | -70322 | 1397905 |
| Percent % | 316% | 292% | 434% | 271% | 139% | 176% | 221% | 126% | 88% | 255% | 83% | 12% | 193% |
| Cumulative Variance | 259066 | 364809 | 648522 | 930777 | 995449 | 1120511 | 1319895 | 1362037 | 1342698 | 1501348 | 1487566 | 1417244 | 1397905 |
| Percent % | 316% | 308% | 349% | 319% | 269% | 248% | 248% | 226% | 205% | 209% | 201% | | |
| Proposal Pr | | | | | | | | | | | | | |
| Proposal Ne | | | | | | | | | | | | | |

### Know where you stand

… and what it is going to take to make your goals. The essential elements of the sale plan are measuring against goals: what is done and what is coming down the line.

**Sales Management | Identifier Distribution Results**

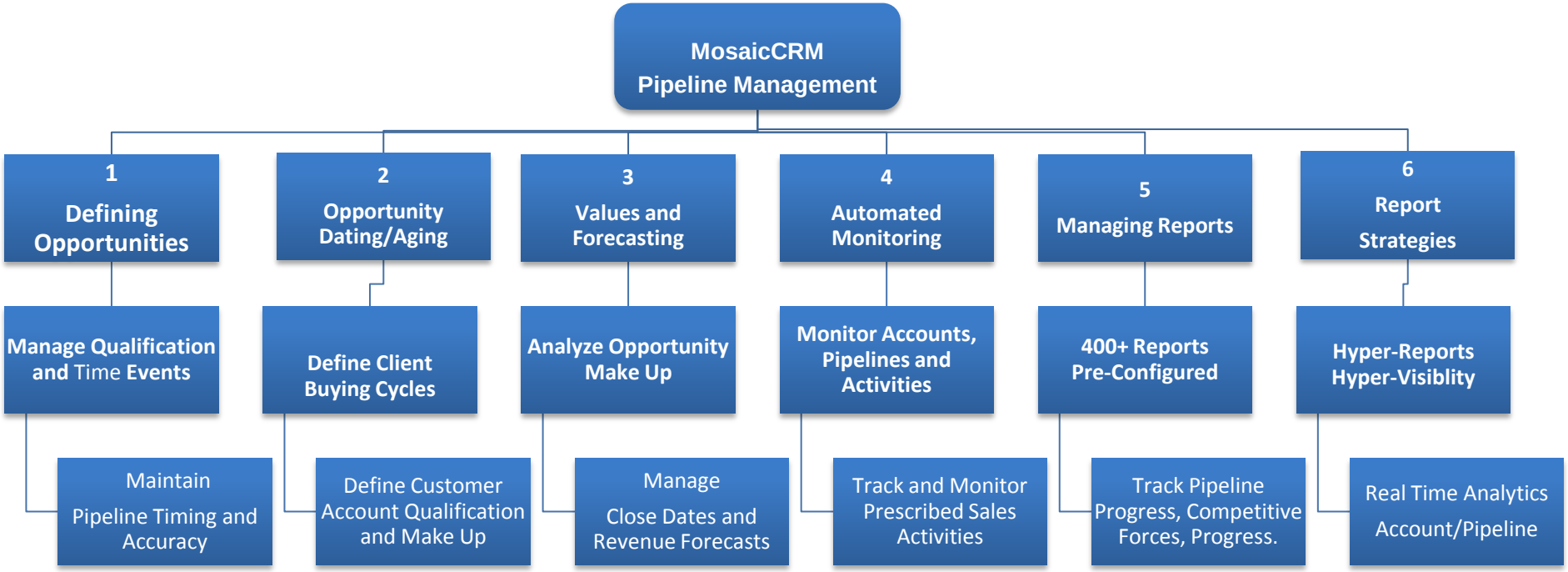
| Identifier | Owner | Stage | Account Name | Client Name | Product | Term | Units | # Mos | Start Date | January | February | March | April | May | June | July | August | September | October | November | December | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Sacramento, CA | Bill Jones | Closed Sale | Acme Houston | McDonald's | Trucksides | | 32 | 2 | 04/07/2011 | | | 26800 | 14000 | | | | | | | | | |
| | | | | | | | | | Total | 0 | 0 | 26800 | 14000 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 40800 |
| Colorado Springs, CO | Bill Jones | Closed Sale | Acme Houston | McDonald's | Trucksides | 3-5 billing periods | 72 | 4 | 07/18/2011 | | | | 14200 | 7200 | 7200 | 7200 | 0 | 0 | 0 | 0 | 0 | 35800 |
| | | | | | | | | | Total | 0 | 0 | 0 | 14200 | 7200 | 7200 | 7200 | 0 | 0 | 0 | 0 | 0 | 35800 |
| Colorado Springs, CO | Bill Jones | Closed Sale | Acme Houston | McDonalds | Trucksides | 3-5 billing periods | 72 | 4 | 07/18/2011 | | | | 14200 | 7200 | 7200 | 7200 | 0 | 0 | 0 | 0 | 0 | 35800 |
| | | | | | | | | | Total | 0 | 0 | 0 | 14200 | 7200 | 7200 | 7200 | 0 | 0 | 0 | 0 | 0 | 35800 |
| Colorado Springs, CO | John Smith | Closed Sale | AdWorks | McDonald's | Trucksides | 3-5 billing periods | 72 | 4 | 07/18/2011 | | | | 14200 | 7200 | 7200 | 7200 | 0 | 0 | 0 | 0 | 0 | 35800 |
| | | | | | | | | | Total | 0 | 0 | 0 | 14200 | 7200 | 7200 | 7200 | 0 | 0 | 0 | 0 | 0 | 35800 |
| Colorado Springs, CO | Bill Jones | Closed Sale | AdWorks | McDonalds | Trucksides | 3-5 billing periods | 72 | 4 | 07/18/2011 | | | | 14200 | 7200 | 7200 | 7200 | 0 | 0 | 0 | 0 | 0 | 35800 |
| | | | | | | | | | Total | 0 | 0 | 0 | 14200 | 7200 | 7200 | 7200 | 0 | 0 | 0 | 0 | 0 | 35800 |
| | | | | | | | | | Colorado Total | 0 | 0 | 26800 | 70800 | 28800 | 28800 | 28800 | 0 | 0 | 0 | 0 | 0 | 154800 |
| Washington, DC | Bill Jones | Closed Sale | AdWorks | WHUR Radio | Trucksides | 6 + billing periods | 210 | 8 | 10/28/2011 | | | 29460 | 29458 | 29458 | 0 | 0 | 29458 | 29458 | 29458 | | | 176750 |
| | | | | | | | | | Total | 0 | 0 | 29460 | 29458 | 29458 | 0 | 0 | 29458 | 29458 | 29458 | 0 | 0 | 176750 |
| Washington, DC | John Smith | Closed Sale | Master Marketers | Subway | Trucksides | | 46 | 1 | 07/11/2011 | | | | | | | 78200 | | | | | | 78200 |
| | | | | | | | | | Total | 0 | 0 | 0 | 0 | 0 | 0 | 78200 | 0 | 0 | 0 | 0 | 0 | 78200 |
| Washington, DC | John Smith | Closed Sale | Acme Houston | WHUR Radio | Trucksides | 6 + billing periods | 210 | 8 | 10/28/2011 | | | 29460 | 29458 | 29458 | 0 | 0 | 29458 | 29458 | 29458 | | | 176750 |
| | | | | | | | | | Total | 0 | 0 | 29460 | 29458 | 29458 | 0 | 0 | 29458 | 29458 | 29458 | 0 | 0 | 176750 |
| Washington, DC | John Smith | Closed Sale | Master Marketers | Subway | Trucksides | | 46 | 1 | 07/11/2011 | | | | | | | 78200 | | | | | | 78200 |
| | | | | | | | | | Total | 0 | 0 | 0 | 0 | 0 | 0 | 78200 | 0 | 0 | 0 | 0 | 0 | 78200 |
| | | | | | | | | | District of Colur | 0 | 0 | 58920 | 58916 | 58916 | 0 | 156400 | 58916 | 58916 | 58916 | 0 | 0 | 509900 |
| Fort Myers/Naples, FL | John Smith | Closed Sale | Master Marketers | Subway | Trucksides | | 5 | 1 | 01/03/2011 | 8875 | | | | | | | | | | | | 8875 |
| | | | | | | | | | Total | 8875 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 8875 |
| Jacksonville, FL | John Smith | Closed Sale | Acme Houston | MetroPCS | Trucksides | | 33 | 3 | 03/17/2011 | 12100 | 12100 | 12100 | | | | | | | | | | 36300 |
| Jacksonville, FL | John Smith | Closed Sale | Acme Houston | MetroPCS | Trucksides | | 22 | 2 | 11/30/2011 | | | | | | | | | | 12100 | 12100 | | 24200 |
| | | | | | | | | | Total | 12100 | 12100 | 12100 | 0 | 0 | 0 | 0 | 0 | 0 | 12100 | 12100 | 0 | 60500 |
| Fort Myers/Naples, FL | Bill Jones | Closed Sale | Acme Houston | Subway | Trucksides | | 5 | 1 | 01/03/2011 | 8875 | | | | | | | | | | | | 8875 |

### High Visibility Forecasting

- Ideal for tracking and analyzing multiple Customers associated with a specific Agency/Distributor.
- Including key sales opportunity data fields and how these are associated with where the opportunity was generated together with any related master Account/Agency affiliations.

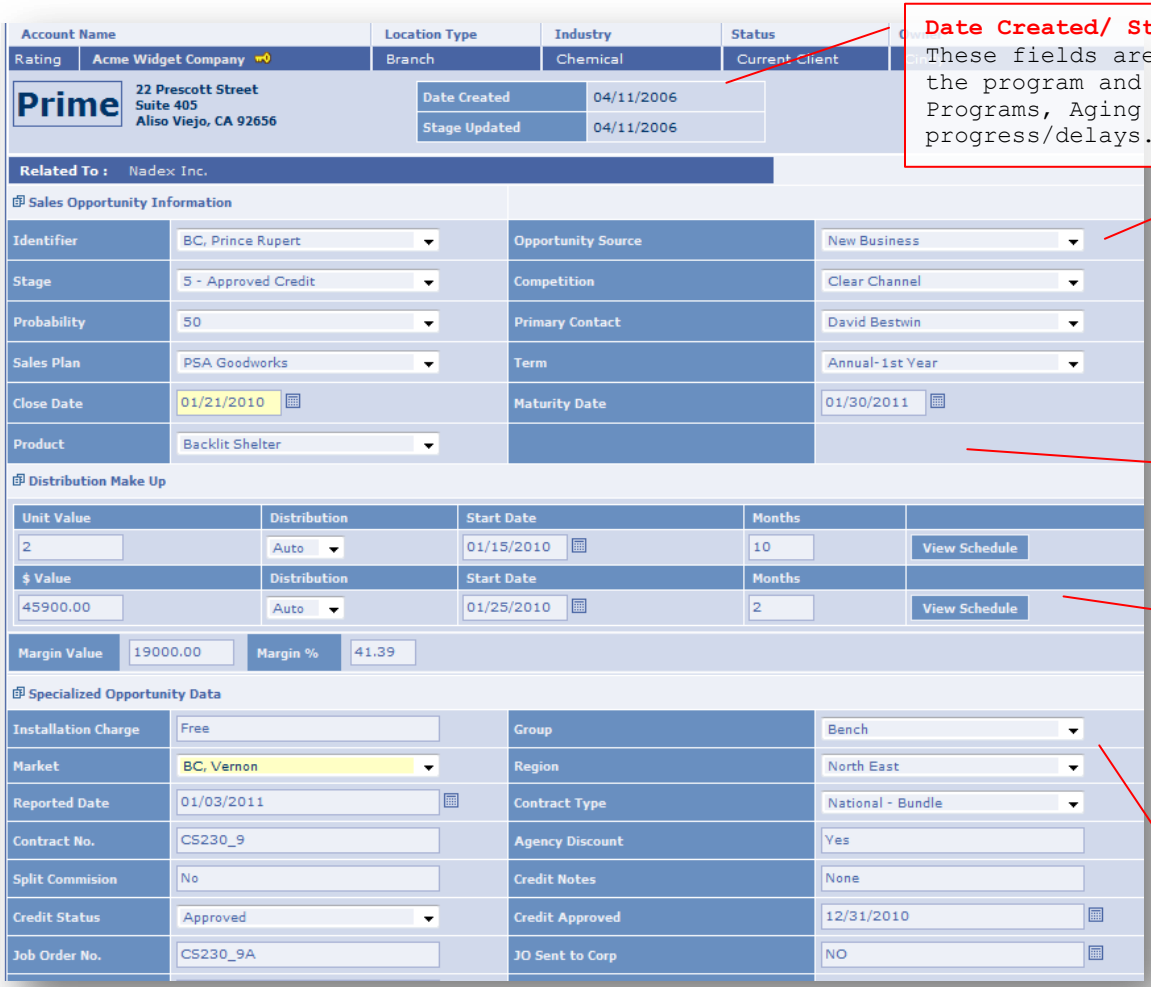
## Six Components of a Total 'Business Management' Solution

Mosaic's Account Management components allow you to manage the multiple tasks of a Customer Acquisition and Customer Retention with powerful ways and means to define all aspects of an organizations sales and marketing processes, manage the Buying Cycles, maximize resources and have reliable change management analytics to know instantly what is working, and what's not.



# 1: Where to Begin: Defining Sales Opportunities

Detailed Sales Opportunity data provides the Rep and Management with a **strategy, record and a means to manage** the business side of selling. Classifying and responding to the dynamics of identifying, negotiating and closing a transaction are simplified into a single screen.




**Date Created/ Stage Updated**
These fields are inserted by the program and trigger Alert Programs, Aging and Stage progress/delays.

**Sales Opportunity**
Exclusive **Identifier** component manages sales opportunities across the organization. Tracking of Product, Sales Plans, Source and Competition is automatic.

**Buying Cycle Monitors**
Mosaic automatically monitors Closing, Contract Start and Expiry dates plus Term.

**Values & Distribution**
Track $ and Unit Volumes and Margins, then manage the revenue streams over the life of the opportunity for ultra accurate forecasting.

**Opportunity Analytics**
Manage any aspect of the opportunity fulfillment and securely share across the organization.

## 2: Opportunity Dating and Aging: Managing Client Buying Cycles

Managing buying cycles improves resource allocations and speeds up revenue. All 'Critical Client Dates' above are monitored by Mosaic's Automated Account Monitoring Program to ensure nothing is dropped or forgotten.

Sales Management | **Aging Analysis Results**

Aging Analysis Results

| Account | Product | Stage | Value | Opened | Close Date | Days | Owner |
|---|---|---|---|---|---|---|---|
| Gerber Lazy Boy | Seventies | Approved Credit | 100,000.00 | 09/22/2003 | 03/28/2008 | 1649 | jsimmon |
| Crystal Glass | Seventies | Promised | 70,005.00 | 02/17/2006 | 03/16/2006 | 27 | rparha |
| Canada One Factory Outlets | Full Wrap | Promised | 65,000.00 | 02/21/2006 | 12/07/2006 | 289 | bmcma |
| Outlooks for Men | Seventies | Approved Credit | 65,000.00 | 10/19/2004 | 09/28/2006 | 709 | cmarlo |
| DFH Realty | Super Tail | Approved Credit | 52,078.00 | 02/01/2005 | 09/20/2006 | 596 | cmarlo |
| Air Transat | Seventies | Approved Credit | 50,000.00 | 12/21/2004 | 02/10/2006 | 416 | rparha |
| Donato Salon & Spa | Full Wrap - Artic with Window | Credit Info In | 48,100.00 | 01/04/2006 | 02/15/2006 | 42 | tarche |
| Emilian Jewellery | Full Wrap - Artic with Window | Promised | 46,735.00 | 11/22/2005 | 12/25/2005 | 33 | tarche |
| Trader Classified Media | Full Back | Credit Info In | 43,332.00 | 12/09/2005 | 07/28/2006 | 231 | cmarlo |
| Wave 94.7 - Smooth Jazz | Full Wrap | Credit Info In | 39,000.00 | 12/29/2005 | 01/15/2006 | 17 | tarche |
| Donato Salon & Spa | Full Wrap | Credit Info In | 38,935.00 | 01/23/2006 | 02/20/2006 | 28 | tarche |
| Trader Classified Media | Full Back | Credit Info In | 34,860.00 | 01/26/2006 | 07/27/2006 | 182 | cmarlo |
| Capilano Mall | Seventies | Promised | 24,960.00 | 10/18/2005 | 04/26/2006 | 190 | jkann |
| Best Buy | Brand Station | Proposal Presented | 24,070.00 | 10/06/2005 | 10/24/2005 | 18 | ckincai |
| AllWest Insurance | Super Tail | Credit Info In | 23,361.00 | 01/30/2006 | 01/16/2008 | 716 | jprio |
| Dave Boyce Insurance Agency & Annuity | Full Back | Credit Info In | 20,540.00 | 11/10/2005 | 11/10/2005 | 0 | ppich |
| Concord Security Corporation | ST Plat Poster | Credit Info In | 19,500.00 | 02/21/2006 | 02/21/2006 | 0 | jcrotea |
| Road Wise Truck Training | Full Side | Credit Info In | 19,500.00 | 11/22/2005 | 11/22/2005 | 0 | enage |
| Seven Dwarfs Restaurant | Super Tail | Proposal Presented | 16,835.00 | 11/08/2005 | 11/20/2005 | 12 | enage |
| Jim Pattison Volvo - | | | | | | | |
| SG Power | | | | | | | |
| Sunrise Soya Foods | | | | | | | |
| Robert Alexander | | | | | | | |
| Jordan Hurdal - Angel | | | | | | | |

Sales Management | **Contracts Expiring**

Contracts Expiry report

| Account | Identifier | Product | Expiry Date | Value |
|---|---|---|---|---|
| Acme Widget Company | Needs Assessment | DD Full Back GL | 01/02/2011 | 13,000.00 |
| Expiring Next 30 Days | | | Opportunity Total :1 | Opportunity Total :13,000.00 |
| Acme Widget Company | Needs Assessment | DD Full Back GL | 01/02/2011 | 13,000.00 |
| Expiring Next 60 Days | | | Opportunity Total :1 | Opportunity Total :13,000.00 |
| Acme Widget Company | Needs Assessment | DD Full Back GL | 01/02/2011 | 13,000.00 |
| Expiring Next 90 Days | | | Opportunity Total :1 | Opportunity Total :13,000.00 |

**Automated Account Management Program**

- When an Opportunity reaches a prescribed 'age' with no update or progress, the sales person and direct manager are alerted and options include automatically reclassifying it to a 'Deal Lost' Status.
- **The Pipeline Aging Report** references these dates to provide analysis of the Opportunity and the overall Pipeline. The key to faster sales is improving the aging with focus on the Client's Buying Cycles.
- **Overdue Opportunity Close Dates** are automatically re-scheduled and the salesperson alerted.
- **Contract Expiry Dates** are monitored and a prescribed series of alerts are sent to the salesperson for follow up.

Personal Event Dates

| Event Type | Date | Priority |
|---|---|---|
| 1 Year With Ob | 03/01/2011 | Level1 |
| Annual Plan Ap | 09/01/2011 | Level2 |
| Anniversary | 02/01/2011 | Level2 |

Event Notes: Priority Alerts are scheduled for Contract Renewal and Contract Review periods, including Anniversary Promotions for Customer Retention

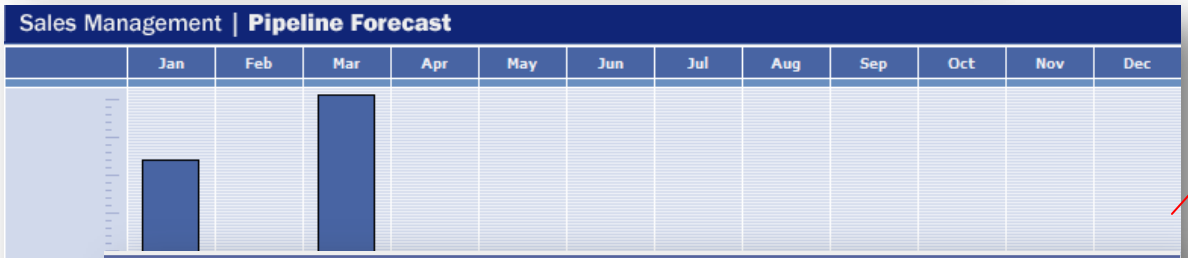
## Automated Contact Monitors

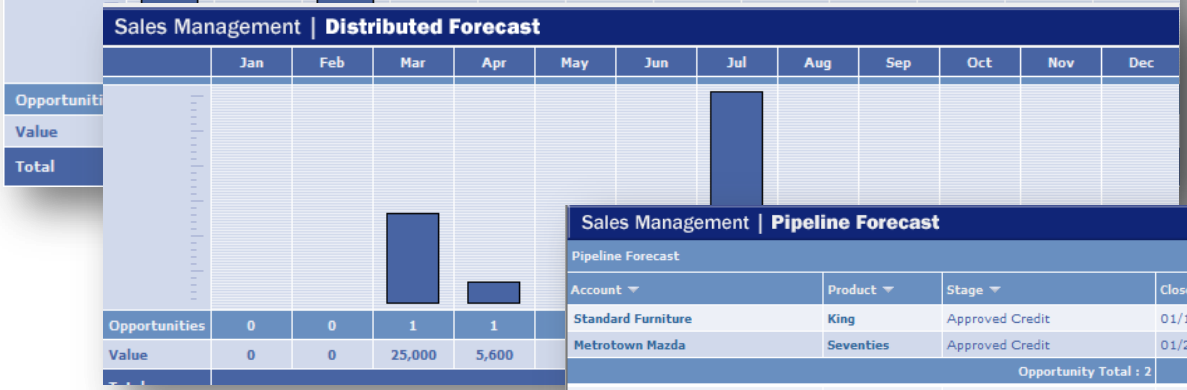
Mosaic offers a second back up of Opportunity/Account tracking Priority Alerts associated with the key contacts in the client organization. Track anniversary dates, budget planning and contract renewals.

# 3: Values and Forecasting Using the Sales Opportunity System

The Pipeline Forecasting tools encompass two primary dates: The first is monitoring the **'Close Date'** and when the **'Actual Revenue' (Distribution)** will occur. Each has its own Value e.g. the Close Date with a total value and the Forecasted Actual Revenue with its initial and/or stream date period. The management of each requires a different approach and objective.


**Buying Cycle Monitors**
Mosaic automatically monitors Closing, Contract Start and Expiry dates plus Term.

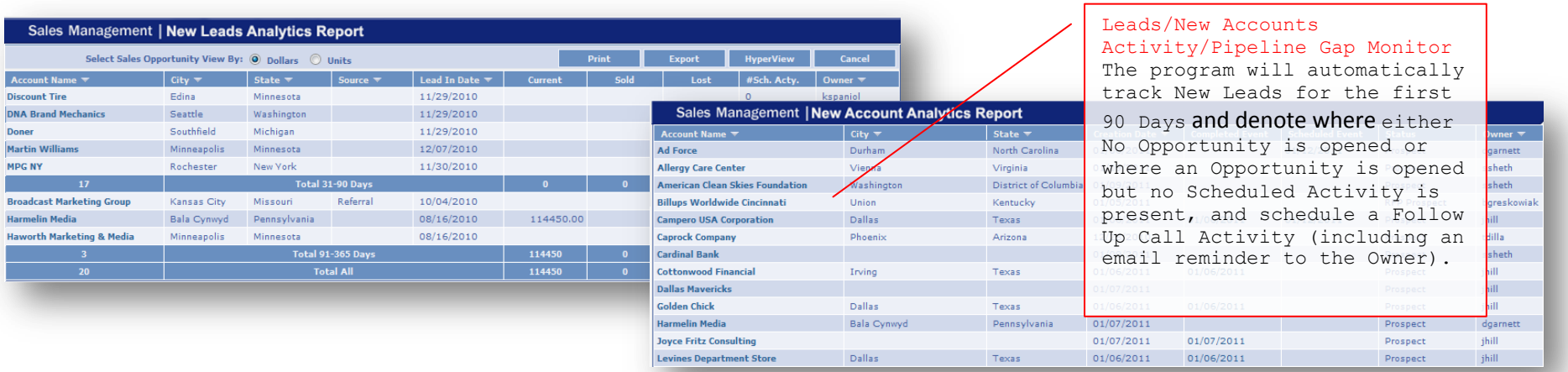



**Sales and Revenue Distribution**
Compare sales and revenue streams by Close Date, Contract Start Dates and Contract Term. Monitor by Individual, Group, Region and Product.

# 4: Extended Automated Account Monitoring Program

Mosaic CRM provides the ability to routinely and automatically scan your Pipeline Opportunities each week and look for lapsed **'Close Dates'**, associated **'Past Due Activities'** or **'No Scheduled Activity'** . The monitoring program is extended for **'New Leads', New Accounts** and **'Key' Accounts** to further assist the salesperson and management to maintain tight control over Opportunities and Activities.



Sales Management | New Leads Analytics Report

Select Sales Opportunity View By: Dollars Units

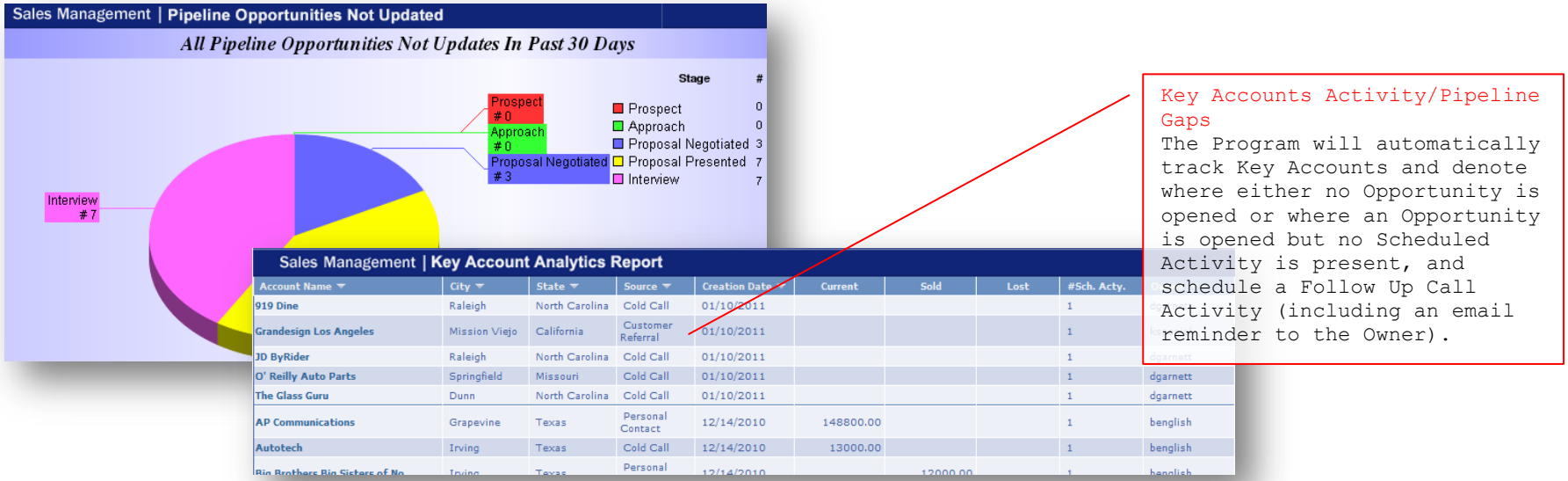
Print Export HyperView Cancel

| Account Name | City | State | Source | Lead In Date | Current | Sold | Lost | #Sch. Acty. | Owner |
|---|---|---|---|---|---|---|---|---|---|
| Discount Tire | Edina | Minnesota | | 11/29/2010 | | | | 0 | kspaniol |
| DNA Brand Mechanics | Seattle | Washington | | 11/29/2010 | | | | | |
| Doner | Southfield | Michigan | | 11/29/2010 | | | | | |
| Martin Williams | Minneapolis | Minnesota | | 12/07/2010 | | | | | |
| MPG NY | Rochester | New York | | 11/30/2010 | | | | | |
| 17 | Total 31-90 Days | | | | 0 | 0 | | | |
| Broadcast Marketing Group | Kansas City | Missouri | Referral | 10/04/2010 | | | | | |
| Harmelin Media | Bala Cynwyd | Pennsylvania | | 08/16/2010 | 114450.00 | | | | |
| Haworth Marketing & Media | Minneapolis | Minnesota | | 08/16/2010 | | | | | |
| 3 | Total 91-365 Days | | | | 114450 | 0 | | | |
| 20 | Total All | | | | 114450 | 0 | | | |

Sales Management | New Account Analytics Report

| Account Name | City | State | | | | | Owner |
|---|---|---|---|---|---|---|---|
| Ad Force | Durham | North Carolina | | | | | dgarnett |
| Allergy Care Center | Vienna | Virginia | | | | | jsheth |
| American Clean Skies Foundation | Washington | District of Columbia | | | | | jsheth |
| Billups Worldwide Cincinnati | Union | Kentucky | | | | | dgreskowiak |
| Campero USA Corporation | Dallas | Texas | | | | | jhill |
| Caprock Company | Phoenix | Arizona | | | | | ddilla |
| Cardinal Bank | | | | | | | jsheth |
| Cottonwood Financial | Irving | Texas | | | | | jhill |
| Dallas Mavericks | | | 01/07/2011 | | | Prospect | jhill |
| Golden Chick | Dallas | Texas | 01/06/2011 | 01/06/2011 | | Prospect | jhill |
| Harmelin Media | Bala Cynwyd | Pennsylvania | 01/07/2011 | | | Prospect | dgarnett |
| Joyce Fritz Consulting | | | 01/07/2011 | 01/07/2011 | | Prospect | jhill |
| Levines Department Store | Dallas | Texas | 01/06/2011 | 01/06/2011 | | Prospect | jhill |

Leads/New Accounts Activity/Pipeline Gap Monitor
The program will automatically track New Leads for the first 90 Days and denote where either No Opportunity is opened or where an Opportunity is opened but no Scheduled Activity is present, and schedule a Follow Up Call Activity (including an email reminder to the Owner).



Sales Management | Pipeline Opportunities Not Updated

*All Pipeline Opportunities Not Updates In Past 30 Days*



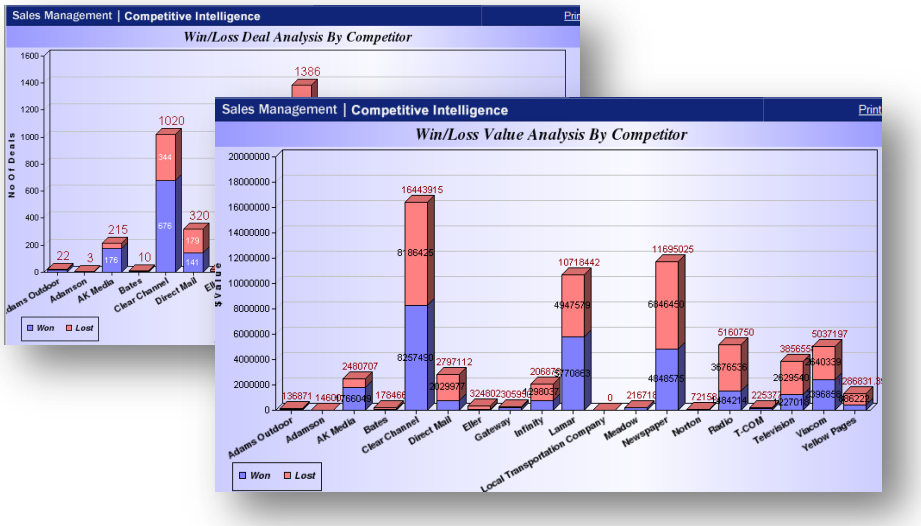
Sales Management | Key Account Analytics Report

| Account Name | City | State | Source | Creation Date | Current | Sold | Lost | #Sch. Acty. | |
|---|---|---|---|---|---|---|---|---|---|
| 919 Dine | Raleigh | North Carolina | Cold Call | 01/10/2011 | | | | 1 | |
| Grandesign Los Angeles | Mission Viejo | California | Customer Referral | 01/10/2011 | | | | 1 | |
| JD ByRider | Raleigh | North Carolina | Cold Call | 01/10/2011 | | | | 1 | |
| O' Reilly Auto Parts | Springfield | Missouri | Cold Call | 01/10/2011 | | | | 1 | dgarnett |
| The Glass Guru | Dunn | North Carolina | Cold Call | 01/10/2011 | | | | 1 | dgarnett |
| AP Communications | Grapevine | Texas | Personal Contact | 12/14/2010 | 148800.00 | | | 1 | benglish |
| Autotech | Irving | Texas | Cold Call | 12/14/2010 | 13000.00 | | | 1 | benglish |
| Big Brothers Big Sisters of No | Irving | Texas | Personal | 12/14/2010 | | 12000.00 | | 1 | benglish |

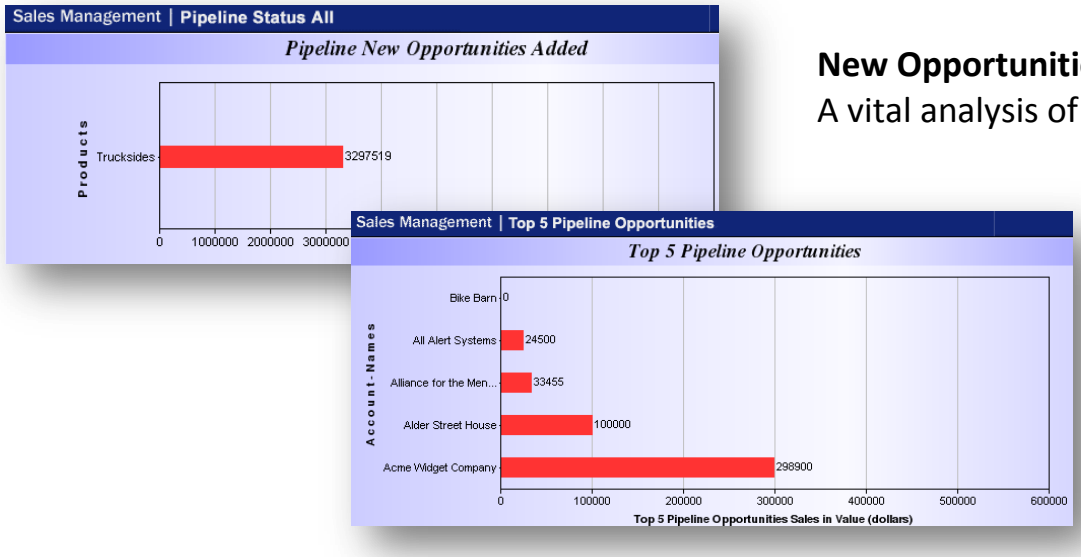
Key Accounts Activity/Pipeline Gaps
The Program will automatically track Key Accounts and denote where either no Opportunity is opened or where an Opportunity is opened but no Scheduled Activity is present, and schedule a Follow Up Call Activity (including an email reminder to the Owner).

## 5: Extended Sales Opportunity Report/Monitoring Program

MosaicCRM CRM allows the User and/or Manager to access a complete **Business Status Report** on hundreds of activity, sales, competitor, leads and key accounts analytics… all at the click of the mouse. Our strength is an ultra-comprehensive Sales and Forecasting Analytics System that is easy to understand.




**Competitive Analysis –**
Know where you are winning and losing.




**New Opportunities Added –**
A vital analysis of the lifeblood of sales

**Top 5 Pipeline Opportunities –**
Defines what hot and shouldn't be ignored.

## 6: Report Strategies – Easy to Understand Business Metrics

The automated reporting capabilities of MosaicCRM provide the Manager and Rep with a host of **pre-configured reports** that add practical business metrics to their everyday sales processes. Management and Reps gain an invaluable means of being able to visualize their business and the vital issues they need to maintain customers and close new accounts.

| **Key Sales and Business Management Reports** | | | |
|---|---|---|---|
| **Report Name** | **Description** | | **Techniques** |
| This Week's Forecasted Sales | What Opportunities are scheduled to close this week. | | Upon logging on, the Home Page data is automatically presented.<br>• Note: Manager's have a Group View of the Home page. In the **QuickView** section, select the 'Rep' or 'All' View to recalculate the results for the Group's combined values.<br>• This can be reviewed quickly on a daily basis. |
| Pipeline/Sales Summary | What Current Sales Opportunities are Open, Closed/Won and Lost on a YTD basis: | | |
| Stage Analysis | Illustrates the Value of the Forecasted Sales Opportunities by individual **Stage** with an itemized Account Summary.<br>• This can be reviewed quickly on a daily basis. | | This provides an interesting view of where the Opportunities lie relative to their progress through the **Stage** process. It provides a heads up to the Rep and Manager in terms of being able to compare sales projections versus where the Values are in the pipeline. |
| Pipeline Forecast<br><br>Pipeline Distribution | Illustrates Sales Forecast by Close Date with Value and Account Summaries.<br><br>• Great for Pipeline review sessions! | | Visual graph of values in pipeline by Month (or select Quarterly View)<br>• Refine data by selecting an individual Owner/Group and by specific Product from the selection groups provided.<br>• Click on the Monthly Value to view Summary Account Make Up data. |
| **Completed Sales** Sales Distribution | Illustrates Completed Sales by Close date. | | Visual view of Completed Sales values by Month (or select Quarterly View)<br>• Refine data by selecting individual Owner/Group and by specific Product. |

| Report Name | Description | | Techniques |
|---|---|---|---|
| **Sales By Identifier** | Illustrates Forecast of Sales by Close date with the ability to custom configure the report contents. | | The Report Query Menu provides a pre-formatted list of Pipeline Accounts.<br>The User has the ability to create Advanced Report data by selecting specific database field information e.g. by Account Rating, specific geographic area etc. |
| **Aging Analysis**<br><br>Pipeline Aging | Illustrates the time the Sales Opportunity is open. | | Provides a pre-formatted Aging Analysis of the all forecasted Sales Opportunities. You can re-sort any of the headers to manipulate the data. It provides a good analysis of how long opportunities take to close by Rep/Group. |
| New Leads Analytics | Illustrates the Activity and Sales Opportunity summary for New Leads. | | Track Leads added into the User's database with particular emphasis on activity management and open sale opportunities.<br>Examine **Opportunity/Activity results.** Close them or transfer them to someone who will close them. |
| Key Account Analytics | Illustrates the Activity and Sales Opportunity summary for Key Accounts. | | Track Key Accounts identified in the User's database with particular emphasis on activity management and open sale opportunities.<br>Assign a sales and numerical **quota** of Key Accounts. Attain results or transfer Accounts to a salesperson who consistently achieves their quota. Look at this weekly. |
| New Opportunities Added | Provides a summary of New Opportunities added to the User's database in the **Past 30 Days** | | Set a minimum value and define improvements needed to reach objective.<br>• Look at this weekly or monthly. |
| Top 5 Pipeline Opportunities | Highlights the Top 5 Pipeline Opportunities by Account Name and Value | | Validate Close dates, values and Stage.<br>• Look at this weekly. |
| Leads Conversion And Leads Opportunity Results | Tracks the Activity and results of Leads added to the User's database. | | Examine Opportunity/Activity results. Close them or transfer them to someone who will close them.<br>• Look at this weekly. |
| Competitive Intelligence Analysis | Provides comparative data on Win/Loss results | | Allows the User to concentrate on strengths; stop selling what customers are buying.<br>Look at this monthly or quarterly. |