



Decision Making Process and Messaging for B2B Software

Confidential

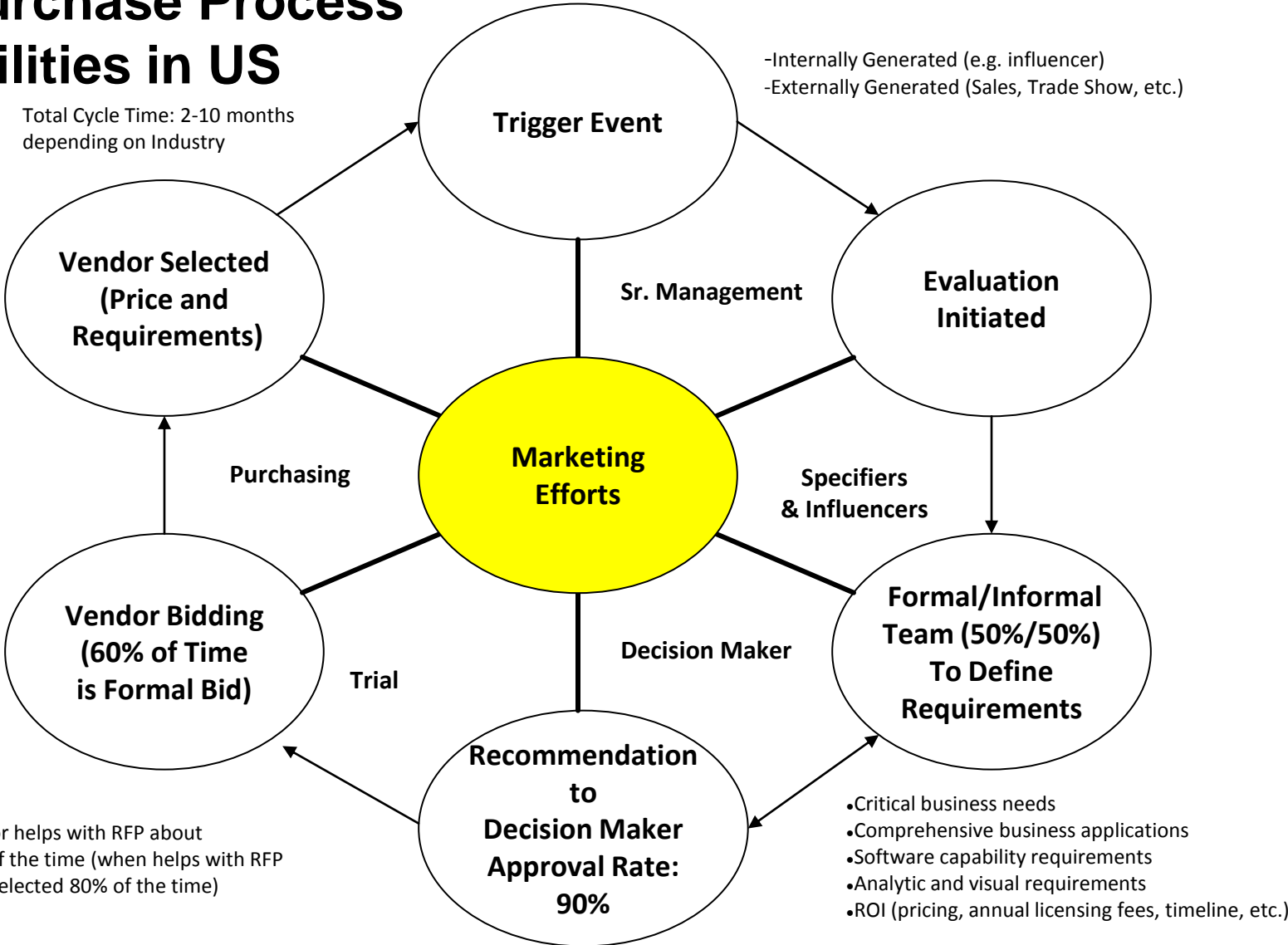


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General Purchase Process for Utilities in US

Total Cycle Time: 2-10 months depending on Industry



% of Departments Involved in Decision to Purchase Visual Mapping Solutions & Impact on Sales Cycle (Decision-Makers, Influencers and Specifiers)

	IT	Purchasing	Operations	Marketing	Sales	Logistics	Sales Complexity	Sales Cycle (Average)
Solution 1	18.5%	7.4%	13.0%	13.4%	18.5%	5.6%	High	5-6 Months
Solution 2	13.5%	5.4%	10.8%	5.4%	2.7%	8.1%	Low	3-4 Months
Solution 3	10.2%	4.0%	7.1%	7.7%	11.1%	5.2%	Low	5-6 Months
Solution 4	13.5%	8.3%	15.6%	5.2%	3.1%	14.6%	Moderate	4-5 Months
Solution 5	23.1%	19.2%	26.9%	3.8%	3.5%	19.2%	High	8-10 Months



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Note 1: Yellow = Priority of Sales and Marketing Efforts

Note 2: Based on surveys and represents typical decision making process today

How Companies Learn About Vendors (%)

	Online	Print	Direct Marketing	Trade Shows	Partner	Word of Mouth ("reputation")
CIO	40.8%	14.8%	22.2%	7.4%	6.8%	26%
CEO	48.6%	16.8%	10.8%	10.8%	32.4%	21.6%
CFO	33.2%	8.6%	9.2%	5.6%	8%	20.4%
IT Manager	41.6%	14.6%	16.6%	20.6%	10.4%	23%
COO	61.6%	7.6%	22.9%	7.6%	30.7%	46.1%
Comments	Typically Use Google for Research	No Single Source of Print	Most Effective in Utilities and Insurance	Trade specific shows for Transportation (typically IT trades shows in transportation)	Partners are important for Utilities and Oil and Gas	



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Yellow = Priority of Sales and Marketing Tactics

Messaging: By Decision Maker

The primary messages for purchase varied by who was the final decision maker in the organization:

Final Decision Maker	Derived Important Messages (statistically significant, with correlation coefficient provided for comparison)	Other Key Messages
CEO	User Friendly (.086)	Business solution to drive sales and functionality (was important for xxxx users in their decision)
CFO	Price (.075)	Free Trial (especially for xxxx users) and Security (based on other data)
IT	Compatibility (.115) Anytime/Anywhere (.095) Collaboration (.115) Security (.085)	(Mostly product messaging)
HR	Security (.099) Free Trial (.092)	Collaboration (especially with a high percent of connected users)
Operations	Price (.100) Easy Integration (.109)	Collaboration (especially when organization has a high percent of connected users)

Trigger Events for Switching

Event Classifications	Today	Tomorrow
-Issues with Current system (email)	Yes	Yes
-Movement to New Location (40% of respondents moved in last 3 years)	Yes	Yes
-Purchase of Mobile Phones for Business ¹	Yes - Cloud	Yes - Cloud
-Increase in outside sales force ¹	Yes - Cloud	Yes - Cloud
-Helps to increase sales or reduce sales cycles (Strategic: 70% of CEOs!)	Little	Significant