BUC BACKSTOP USER CONFERENCE
Communicating with your Network

Katie Escoto & Tiffany McKenzie
Katie Escoto

- Joined Backstop in August 2014
- Professional Services Team
- New York Office
- Marathon Runner
- Proud Corgi Mom
- Sketch/Improv Comedy Troupe
Tiffany McKenzie

- Joined Backstop in May 2013
  - PerTrac CMS Acquisition
- Professional Services Team
- New York Office
- Half-Marathon Runner
- Karaoke Repertoire
  - Madonna – Like a Prayer
  - Cher – Just Like Jesse James
  - Blues Traveler - Hook
Goals of the Session

• Inform
• Keep you Awake
• Help you Communicate Smarter
• Plug Other Sessions
• Entertain
The 3 W’s... and an H!

- Why
- Who
- What
- How!
Why

There is clear value in delivering your message to investors, clients, and stakeholders.
### Competitive Advantage

- Backstop provides multiple functionalities to assist in communicating with your network.

- How best to use Backstop in a way that gives you an edge and helps accomplish your objectives?
Perception

You want…

• …to be informative to your network.

• … your communications to say positive things about your organization.
Who

Let’s consider your audience.
<table>
<thead>
<tr>
<th>Your Network</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Prospects</td>
</tr>
<tr>
<td>• Investors</td>
</tr>
<tr>
<td>• Third Party Contacts to Investors</td>
</tr>
<tr>
<td>• Accountants</td>
</tr>
<tr>
<td>• Consultants</td>
</tr>
<tr>
<td>• Attorneys</td>
</tr>
</tbody>
</table>
What

...is everyone else doing?
### The “Cool Kids” have Communication Plans

<table>
<thead>
<tr>
<th>Introduction</th>
<th>Why</th>
<th>Who</th>
<th>What</th>
<th>How</th>
<th>Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>The “Cool Kids” have Communication Plans</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Outlook, Mail Merge & BCC** 😊
- **Backstop Email Blasts** 😊
- **Backstop Email Blasts + InvestorBridge!** 😊😊
<table>
<thead>
<tr>
<th>Introduction</th>
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<th>Who</th>
<th>What</th>
<th>How</th>
<th>Questions</th>
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</thead>
<tbody>
<tr>
<td><strong>Work Smarter:</strong></td>
<td></td>
<td></td>
<td><strong>Central Repository</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Backstop &amp; InvestorBridge $</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Adds Transparency</td>
<td></td>
<td>• Decreases Operational Risks</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Sick/Vacation</td>
<td>• Knowledge Transfer, Turnover</td>
<td>• Training New Hires</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Document your Process!</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Prospects

- Scheduling Meetings/Calls
  - Tasks for Follow-ups
- Roadshow Announcements
- Document Delivery
  - Sub-Docs
  - PPMs
  - LPAs
Investors

- Monthly Estimates
- Final Numbers
- Documents
  - Statements
  - K-1s
  - Monthly/Quarterly Letters
<table>
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**General**

- Local Events
- Seasonal Greetings
- Firm Announcements
  - Moving Offices
  - InvestorBridge $

Go-Live Announcements!
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**Mass vs. Personal**

- **Mass**
  - Email Center
    - Watermarking
  - InvestorBridge
- **Personal**
  - Summary Book
  - Trip Planning
  - InvestorBridge
**InvestorBridge**

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</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Web Presence</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Secure Portal for Delivering Sensitive Data</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Watermarking</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Secure Portal for Receiving Sensitive Data</strong></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Form Submissions</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>End User Data Information</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Overall Site Traffic</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Document Consumption</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Want more info?
- **Birds of a Feather:** InvestorBridge – 3:25pm
How

Let’s give this all some context
The Story...

The scrappy team at Pied Piper are at a pivotal phase in their development. They need to raise capital!
Initial Setup

The team needs to make some decisions:

• Target List (Custom Layout) or Opportunities?

• Categories or Additional Custom Layouts?

• Want more info?
  • Tracking Your Pipeline Session – 2:05pm
Email Center

Jared and Richard can use Backstop’s Email Center to send blast emails to all their potential investors.

<table>
<thead>
<tr>
<th>Tier</th>
<th>Full Name</th>
<th>Email Address</th>
<th>Phone</th>
<th>Investment Size</th>
<th>Target</th>
<th>Date of Initial Contact</th>
<th>Method of Contact</th>
<th>Categories</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Breem, Laurie</td>
<td><a href="mailto:laurie@avigacap.com">laurie@avigacap.com</a></td>
<td>(415) 387-2934</td>
<td>75,000,000.00</td>
<td>Invested</td>
<td>2/2/2015</td>
<td>Conference</td>
<td>Potential Investor, Tier 1</td>
</tr>
<tr>
<td></td>
<td>Gregory, Peter</td>
<td><a href="mailto:peter@aviga.com">peter@aviga.com</a></td>
<td></td>
<td>25,000,000</td>
<td>Yes</td>
<td>4/5/2014</td>
<td>In Person Meeting</td>
<td>Potential Investor, Tier 1</td>
</tr>
<tr>
<td>1</td>
<td>Total</td>
<td></td>
<td></td>
<td>100,000,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Hanneman, Russ</td>
<td><a href="mailto:russhannemen@russhem.com">russhannemen@russhem.com</a></td>
<td>(650) 924-2042</td>
<td>5,000,000</td>
<td>Invested</td>
<td>3/1/2015</td>
<td>Phone</td>
<td>INW, Potential Investor, Tier 2</td>
</tr>
<tr>
<td>3</td>
<td>Bleson, Gavin</td>
<td><a href="mailto:gbleson@hooli.com">gbleson@hooli.com</a></td>
<td>(415) 955-0008</td>
<td>5,000,000</td>
<td>Rejected</td>
<td>1/1/2015</td>
<td>In Person Meeting</td>
<td>INW, Potential Investor, Tier 3</td>
</tr>
<tr>
<td>3</td>
<td>Total</td>
<td></td>
<td></td>
<td>110,000,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The team will likely want to send their email blast by choosing the “Send to All Contacts in a Category” option, which allows them to narrow down their recipient list to just their potential investors.
Email Center

- Even though Jared is creating the Email Blast, he can choose to have it sent from any of their licensed or Email Only users.
- Jared can use the TinyMCE text editor and Merge fields to customize the message.
Email Center

- If he chooses to attach a PDF document of Pied Piper’s quarterly results, he can watermark it. $^
- Jared can also choose to save the email blast as a template if he plans to send it on a regular basis.
- He can opt to track the blast results after sending the blast.
Email Center

- Before Jared sends the blast to Pied Piper’s potential investors, he can utilize the Test Message functionality to make sure his email will look as expected when it is received.
Email Center

- Once he is happy with the message, Jared can send it out to potential investors and monitor his results.
Opportunities

They will want to link themselves to the meetings and calls they have with potential investors.
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**Battle 1: Custom Layouts vs. Categories**
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**In the Blue Corner: Categories**

- **Uses:**
  - Bucketing Contacts (People and Organizations)
    - Investor Types
    - Fund (Existing, New)
    - Priority Tiers
    - Contact Classification
  - Mailing Lists
- Visible on the Summary Page
In the **Red** Corner: Custom Layouts

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- Flexibility for Field Type
  - Dropdown
  - Multi-Select Dropdown
  - Entity Field
  - Date
  - Decimal
- Grouping in Reporting
# Round 1: Custom Layouts Right Hook

Grouping in Report Builder

<table>
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<tr>
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<td><a href="mailto:laurie@ravigacap.com">laurie@ravigacap.com</a></td>
<td>(415) 387-2934</td>
<td>75,000,000.00</td>
<td>Invested</td>
<td>2/2/2015</td>
<td>Conference</td>
<td>Potential Investor, Tier 1</td>
</tr>
<tr>
<td></td>
<td>Gregory, Peter</td>
<td><a href="mailto:peter@raviga.com">peter@raviga.com</a></td>
<td>(415) 834-9124</td>
<td>25,000,000</td>
<td>Yes</td>
<td>4/5/2014</td>
<td>In Person Meeting</td>
<td>Potential Investor, Tier 1</td>
</tr>
<tr>
<td>Total</td>
<td></td>
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<td></td>
<td>100,000,000.00</td>
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<td>Belson, Gavin</td>
<td><a href="mailto:gbleson@hooli.com">gbleson@hooli.com</a></td>
<td>(415) 955-0008</td>
<td>5,000,000</td>
<td>Rejected</td>
<td>1/1/2015</td>
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<tr>
<td>Total</td>
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<td></td>
<td></td>
<td>110,000,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Round 2: Categories Left Jab

Summary Page & Email Center

Introduction

Who

What

How

Questions

Email Center

Need more flexible options for your recipient list? You can send an email blast to the results of a report builder instead of choosing your recipients here. Check out our [video](#), [documents](#), or contact Backstop Support for more assistance.

Choose Recipients

- Send to One or More Recipients
- Send to All Contacts in a Category
- Send to All Contacts On the Clipboard
- Send to Contacts that Own Accounts or are Related to Accounts by Product
- Send to Contacts that Own Accounts or are Related to Accounts by Entity
- Send to Contacts that are Related to Asset Groups
- Send to Contacts that are Related to Asset Groups by Representative

Select one or more categories of recipients:
- New Investor 2015
- Pension
- Portfolio Company
- Role of Investor
- Prime Brokerage Firm
- Prospect
- Research Target

Opportunities

- Gavin Belson
  - 1 - Prospecting
  - $10,000,000.00
  - Belson, Gavin
  - New Investment
  - 9%
  - 7/13/2015
  - [Edit](#)
  - [Delete](#)
  - [New Account](#)

Accounts

- [Open New Account](#)
- [Show All](#)

- [Add Category](#)
Cool Reporting Tricks

• Last Activities Field

• Math fields to create formula for days since last contact
Cool Reporting Tricks

<table>
<thead>
<tr>
<th>Tier</th>
<th>Stage</th>
<th>Opp Name</th>
<th>Investor</th>
<th>Amount</th>
<th>Target Date</th>
<th>Recent Meetings</th>
<th>Days Since Last Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1- Prospecting</td>
<td>Russ Hanneman</td>
<td>Hanneman, Russ</td>
<td>$5,000,000.00</td>
<td>7/1/2015</td>
<td>Potential Investor Meeting (3/3/2015) Potential Investments</td>
<td>64</td>
</tr>
<tr>
<td></td>
<td>3 - Final Review</td>
<td>Peter Gregory</td>
<td>Gregory, Peter</td>
<td>$25,000,000.00</td>
<td>8/1/2015</td>
<td>Initial Meeting with Peter and Monica (3/1/2014) Potential Investments</td>
<td>431</td>
</tr>
<tr>
<td></td>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td><strong>$30,000,000.00</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>2 - Due Diligence</td>
<td>Laurie Bream</td>
<td>Bream, Laurie</td>
<td>$7,500,000.00</td>
<td>8/17/2015</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>1- Prospecting</td>
<td>Gavin Belson</td>
<td>Belson, Gavin</td>
<td>$10,000,000.00</td>
<td>7/15/2015</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td><strong>$47,500,000.00</strong></td>
<td></td>
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Want more info?
- Advanced Activity Reporting – 2:05pm
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**InvestorBridge**

Richard and the team can invite their potential investors to InvestorBridge, which will allow them to share fund-level details.
Trip Planning

Richard and Erlich also want to meet their potential investors in person to make a case for Pied Piper.

- They can choose an ad hoc list of investors to visit using the Clipboard.
Trip Planning

Richard and Erlich also want to meet their potential investors in person to make a case for Pied Piper.

- Using the information they’ve stored on the clipboard, they can now create an itinerary.
Summary Book

Before each of their meetings, they want a quick snapshot of recent meetings/calls, emails, key personnel.

Peter Gregory Relationship Summary
5/6/2015

Russ Hanneman Relationship Summary
5/6/2015
<table>
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<tr>
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<th>Questions</th>
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</thead>
<tbody>
<tr>
<td>Mobile</td>
<td>Enter meeting details</td>
<td>Look up contact info</td>
<td>Add screen shots and more detail</td>
<td>No additional cost</td>
<td></td>
</tr>
</tbody>
</table>
Success!

Russ Hanneman and Laurie Bream have decided to become investors of Pied Piper
Accounts

Jared creates accounts for Russ and Laurie and can now send documents and statements using:

- Email Center
  - Relationships
  - Categories
- InvestorBridge $
Battle 2: Relationships vs. Categories
Round 1: Categories Left Cross

- “Investor” Category
  - Body of Email – Personalized with Mail Merge Fields
  - Attachments/Documents - same Document to All Investors
    - Cannot personalize
Round 2: Relationships Uppercut

- Body of Email – Personalized with Mail Merge Fields
- Attachments/Documents - Documents by Account
Data Cleanup

In the aftermath of their fundraising efforts, Jared wants to do some maintenance to keep their instance neat.

He can use:

- Exception Reports
- Support Site
  - Documents
  - Videos
  - Study Halls
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</thead>
</table>

Questions

Stop by the BackCHAT Bar or Contact Support

support@backstopsolutions.com

+1 (312) 277-7702

https://support.backstopsolutions.com