



---

**CRM + ECOMMERCE + <sup>Your</sup> ERP**  
--- One Platform ---

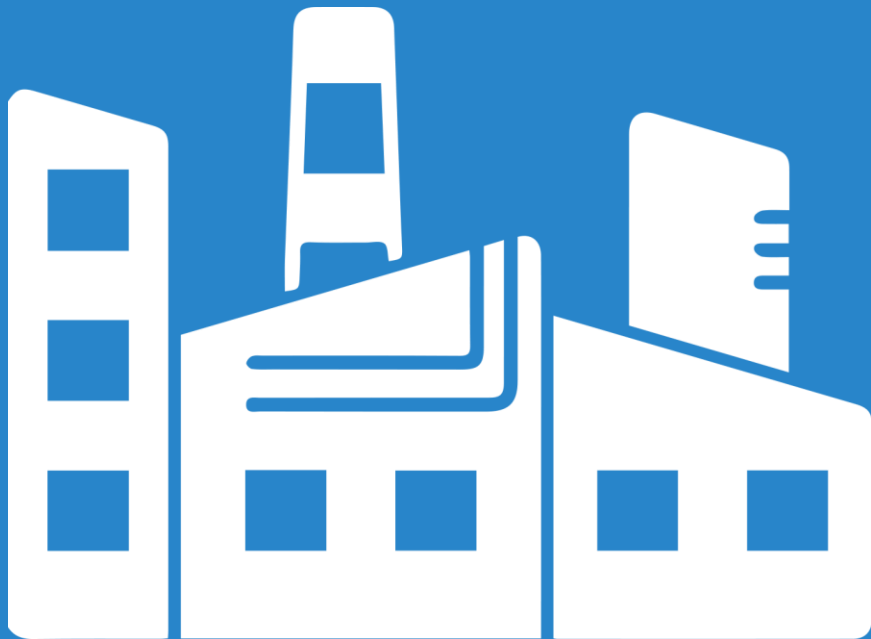
# Agenda

- The Short Story (why Website Pipeline to CIMcloud)
- Business Focus
- Product Overview
- About Us / Stats
- Pricing Model
- Product Investment Focus
  - Features
  - Technology Stack

# Business Focus

# Out Target Market

## Small-Mid Sized Product-Centric B2B Companies in NA

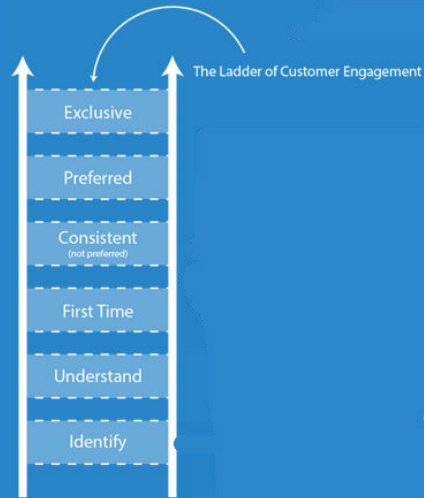


- Based in North America
- Product-centric
  - Dist. / Manuf.
- \$5 - \$300 million
- Use ERP software
- Primarily B2B
- Some B2C

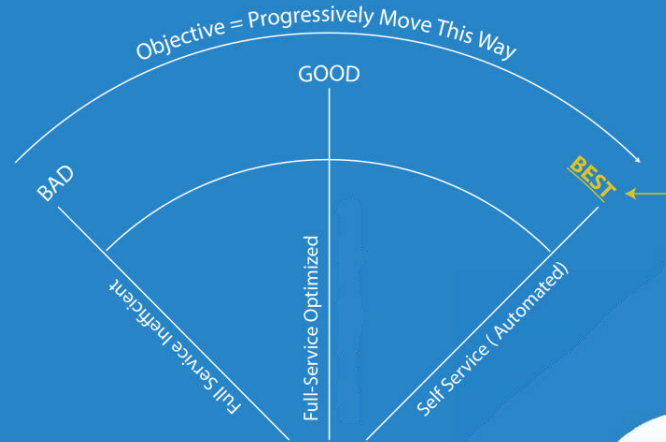
# Key Assumption

# Perfect Optimization of Customer Interactions

Part 1: Perfect Monopoly =  
100% of your target markets



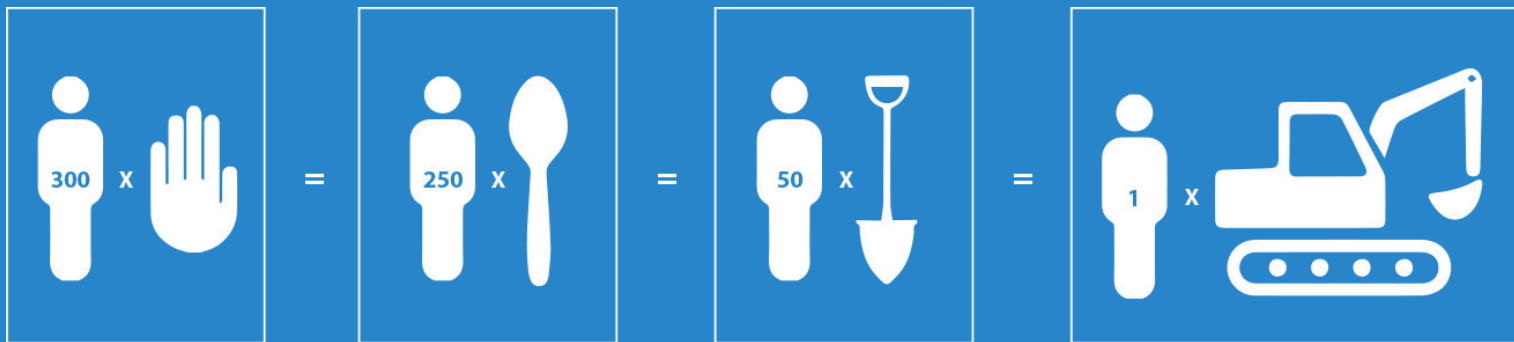
Part 2: Perfectly Automated =  
100% customer self-service



# Tools Multiply Human Effort





Example = Digging a Ditch

- The question: Add man-hours or leverage tools?
- The right tool can multiply (by many times) the output of human effort
- The bigger the ditch, the more critical it is to leverage tools



# Popular Solutions Considered

## Tools & Plans routinely attempted to close the Gap

- Solution #1: Don't Try 
  - You must live with the pain
- Solution #2: All-in-one Suite (i.e. Netsuite) 
  - Requires transplant of the healthy, beating heart (ERP) of your business
- Solution #3: Divide and Conquer (i.e. Ecommerce + CRM + Others?)
  - B2C Ecommerce: Magento, Woo Commerce, Shopify, etc. 
  - Niche Ecommerce for ERP: XM, K-ecom, Clear9,
  - CRM: Salesforce, Sage, Dynamics, Sugar, Zoho, etc. 
  - Missing Capabilities + Data to accomplish the tool's goals
  - Further scattering data, does not allow progression

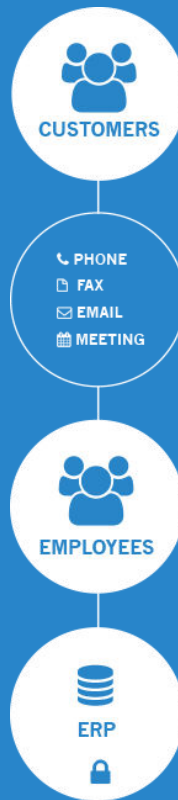


# The B2B Dilemma

# The B2B Dilemma

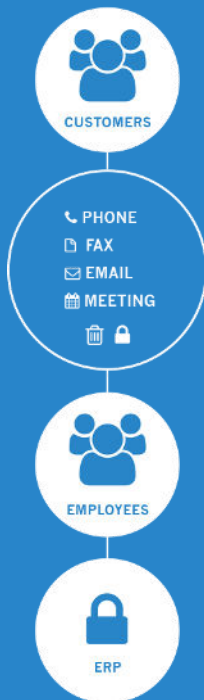
## Customer Interactions are Stuck in the 1990's

- Employees →
  - Stuck in the middle
- Interaction data →
  - Scattered or lost
- Want to Optimize →
  - Don't know how



# The Snap Shot of What We Do

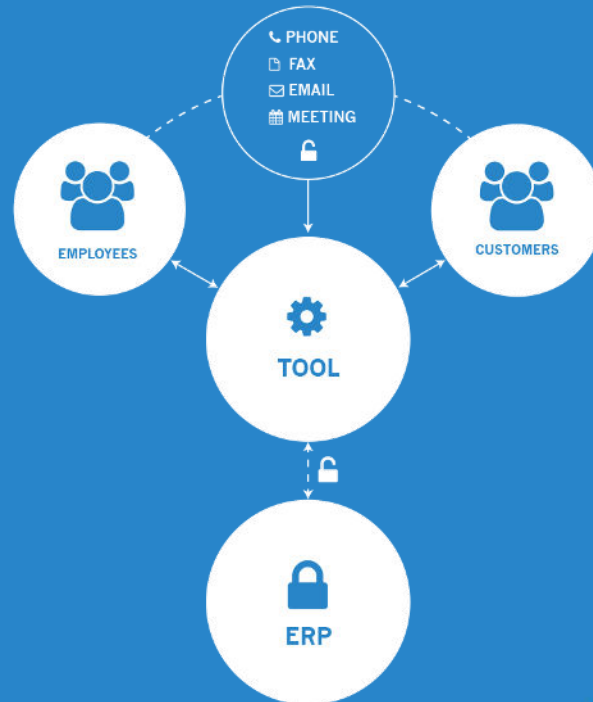
## NOW



**Pain #1**  
Employees are stuck in the middle

**Pain #2**  
Interaction data is scattered everywhere  
or lost completely

## OPTIMIZED



# The Short Story

# Introduction (The Short Story)

- Our Customer's Goal (Boiled Down) = **Optimized Customer Interactions**
  - Get, Keep, and Grow Customers
  - Interaction Better, Faster, and Cheaper
- Website Pipeline's Long & Successful History with Helping
  - Our Focus = Customer Self-Service Tools
  - Our Platform = ERP-Integrated Ecommerce (Web-Store) + B2B Portal
- Customers Reported Huge Gaps with Current Software Categories
  - Strategy to "Divide & Conquer" → "Divide & Chaos" (ecom, crm, help desk, etc)
  - Started Adding Rep Enablement Tools (Rep Tools, Super User Dashboard, Quoting)
- Concluded That an Entire Software Category Was Missing & Sorely Needed
- We Invented The Software Category
- We Are Expanding Our Platform to Solve the Pain
- We Are Rolling it Out Under a New Product / Platform Name

# Examples of Customer Interactions

- How do I apply for an account?
- Is there a replacement for this item available?
- Can you send me an MSDS sheet?
- Is this in stock in the Philadelphia warehouse?
- What's my price on this item?
- When will this item ship?
- Can you revise this quote and resend it?
- Did you my order in?
- What promotions are you running?
- Can you bill the shipping to my UPS account?
- Does this order put me over my credit limit?
- Can you resend me these invoices?
- How much do I still owe on this invoice?
- Which invoice(s) was my payment applied to?
- What credit card was used for this payment?
- Can I return this item?
- Did you receive the items I returned yet?
- Did you credit me for my return yet?
- Can I change my billing address?
- Can you change the credit card I have on file?

# 3 “Buckets” of Customer Interactions



## Employee Activities

Buried or Lost

- **Personal Communications:**  
Emails, phone calls, text, live chats, face to face etc
- **Bulk Communications:**  
**(campaign-style /1-to-Many):**  
Emails, direct mails, webinars etc
- **To Do's (tasks & meetings):**  
Email inboxes, sticky notes, note pads, phones, mental notes, calendars



## Online Activities

Sprawled Across Web

- Customer portal, retail ecommerce, help desk, EDI
- Google analytics, email campaigns, marketing automation etc.
- Email Reactions  
(received, opened clicked)

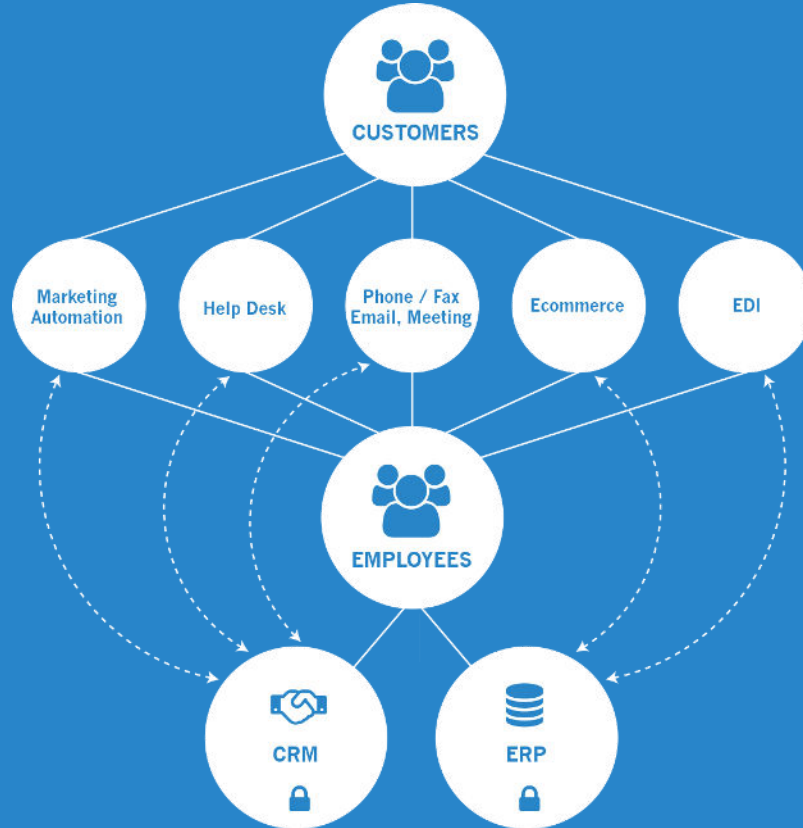


## Transactions

Locked in the ERP

- **Sales Pipeline:**  
Suspects, leads, opportunities, quotes
- **Orders**  
Orders, shipments
- **Billings (AR)**  
Invoices, payments, credits
- **Returns:**  
Returns, repairs, refunds, claims

# A More Comprehensive Diagram of The Dilemma





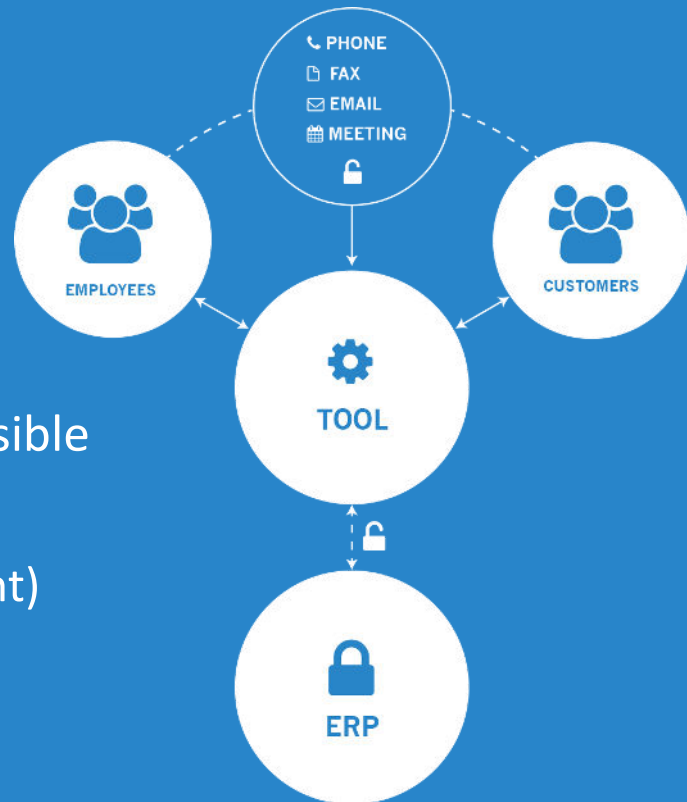
# The Goal To Strive For...

# How To Hit The Goal

# How To Hit The Goal

## Optimized Customer Interactions

- ✓ Tool in the middle (not employees)
- ✓ Interaction data is collected, organized, and visible
- ✓ Tool has capabilities + data to allow
  - ✓ Customers to Self-Service (the way they want)
  - ✓ Employees to Interact (efficiently)
  - ✓ Managers to Manage (effectively)
  - ✓ Apps to Integrate (seamlessly)



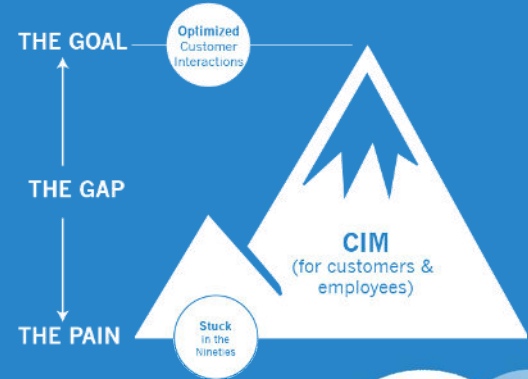
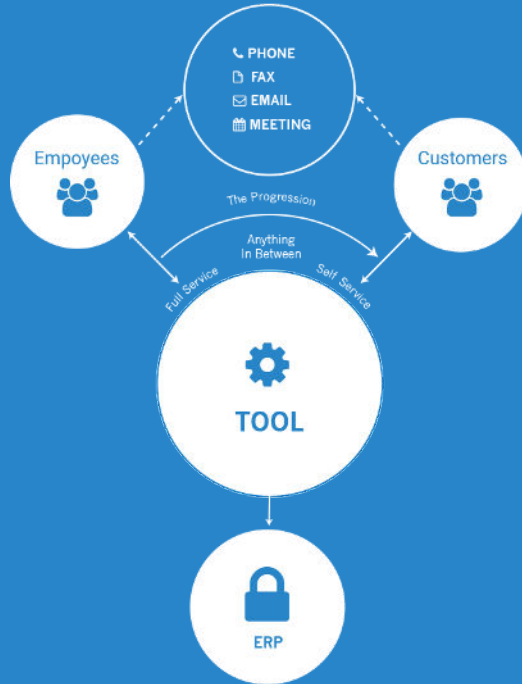
# The Big Keys

- Customers Able To Self-Service The Way They Want To
- Employees (Reps) Have Two Key Objectives:
  - Help Get, Keep, and Grow Customers
  - Help Move Customers To Automated Self-Service
- Should Be One Platform for Customers and Employees
  - Divide & Conquer = Divide & Chaos
- Should Allow for Progression w/out Major Business Disruption
  - Does Not Require ERP Transplant
  - Allows for Step-by-Step Iterations

# Pain Points of Divide & Chaos (vs. CIM)

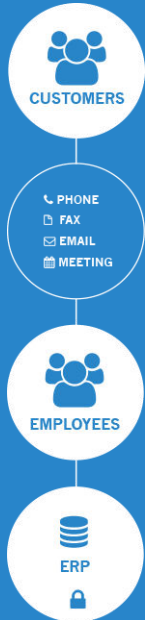
Assistance & Adoption

Two = 4x Your Work (platform + sync)

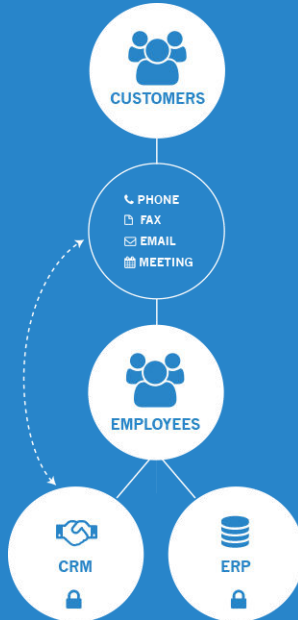


# Side-by-Side: Today's “Divide & Cluster” Solutions

## Simple



## CRM



## Ecom (B2C)

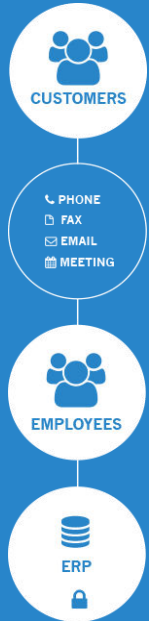


## CRM & Ecom

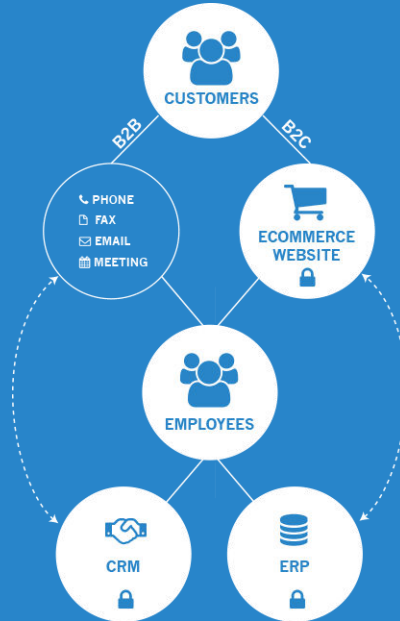


# Side-by-Side: Today's "Divide & Cluster" Solution vs. CIM

Simple

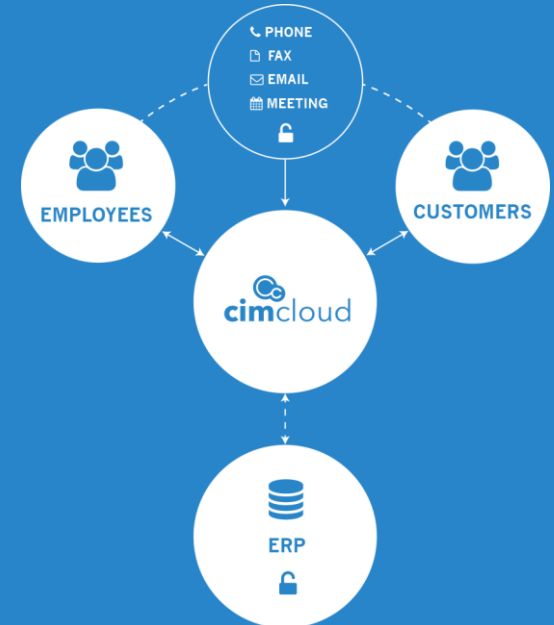


CRM & Ecom



→

CIM



# The Conclusion.

The software category for that “Tool” does not exist.



# A New Software Category

CIM =  
Customer Interaction Management

# CIMcloud

A SaaS Platform

For B2B Product-Centric Companies

Evolving (and Rebranded) from Website Pipeline's  
SaaS ERP-Integrated B2B Ecommerce Platform

# Product Overview

# CIM = CRM + Ecommerce + Your ERP



A lot more ERP's coming!



Your  
ERP



Your  
Customers

✓ Self Service



Your  
Employees

✓ Interact



Your  
Managers

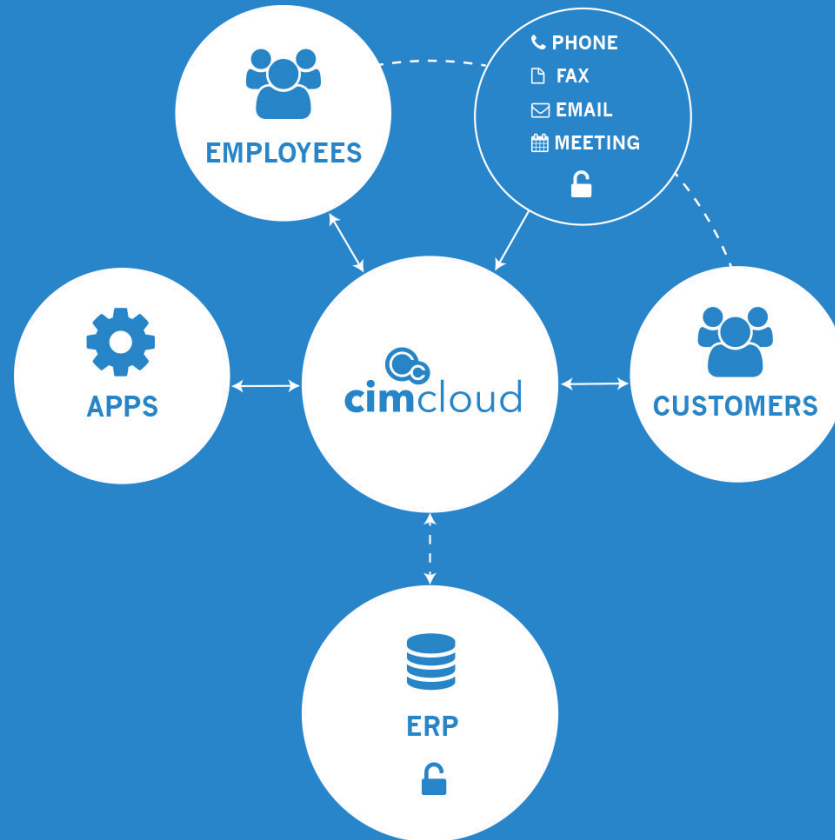
✓ Manage



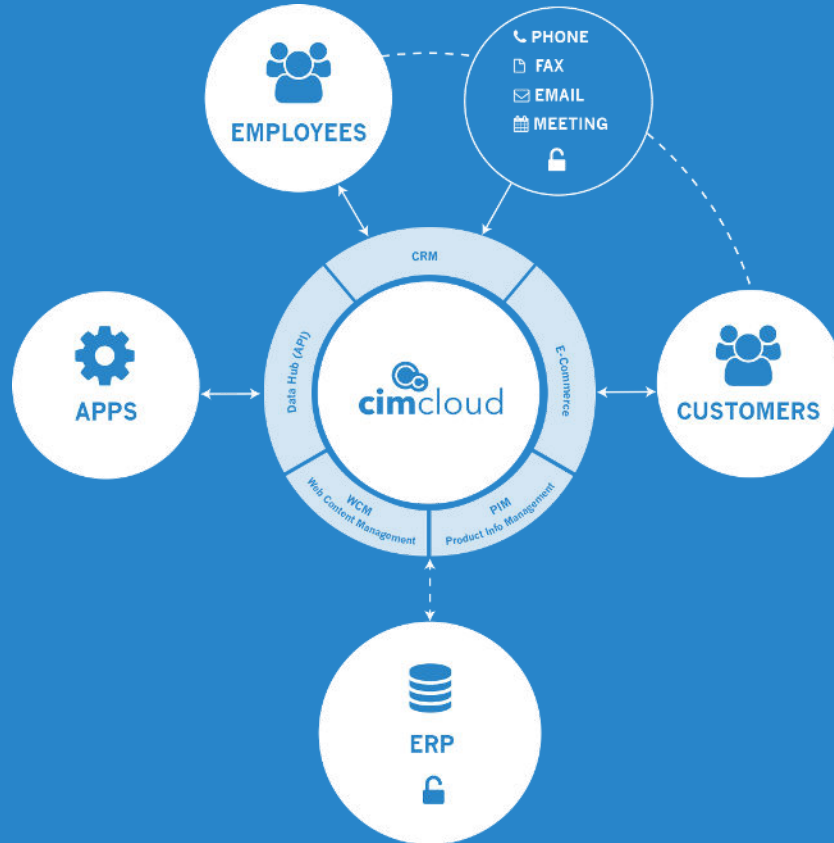
Your  
Applications

✓ Connect

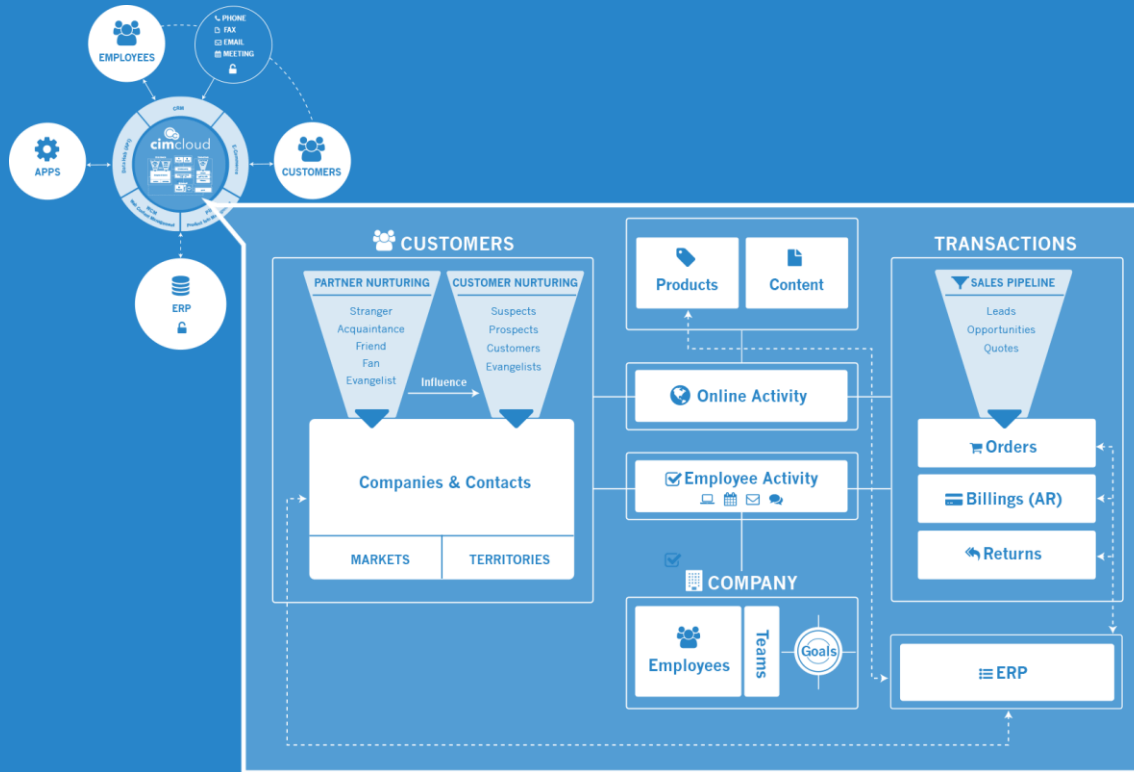
# Audiences Addressed



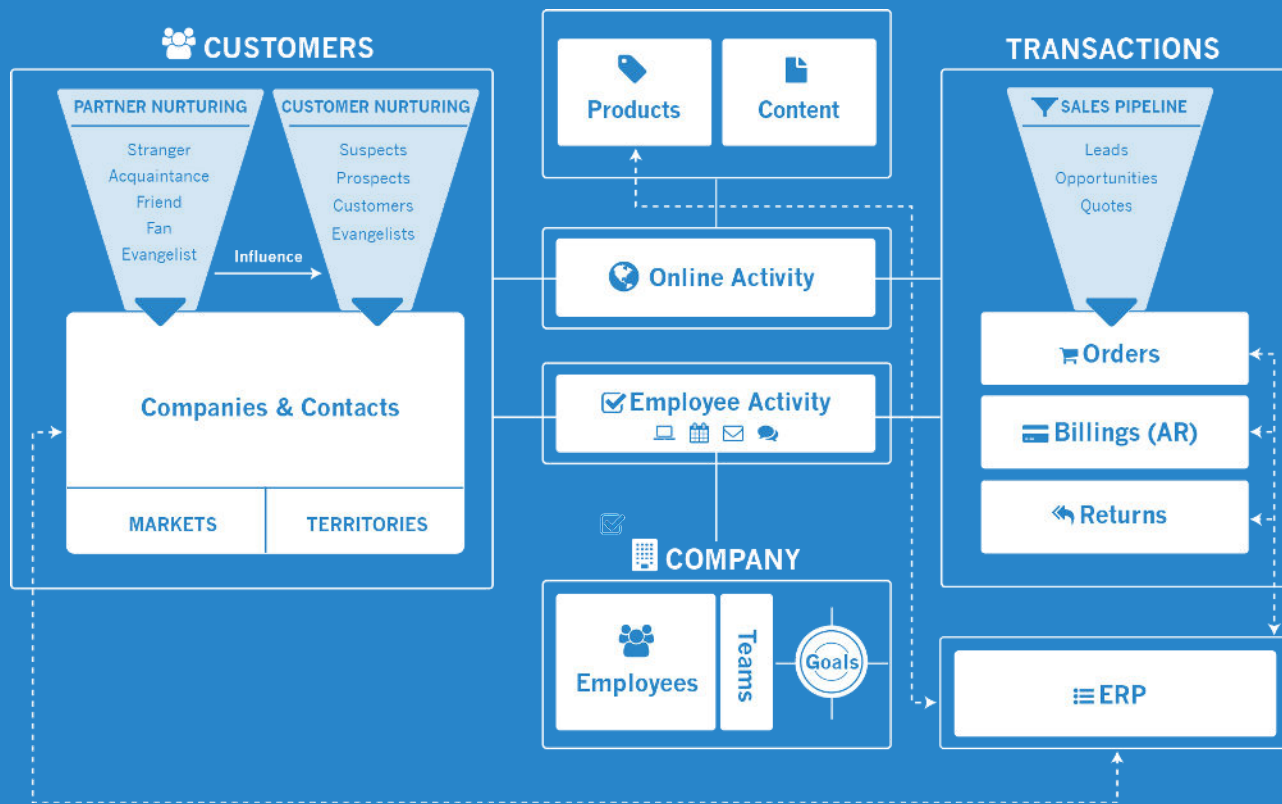
# Software Categories Included



# Functional Overview




# Functional Overview







# Functional Overview


 Search


**Super User Menu**


Switch to Dashboard menu


 **My Quick Access**


 **Customers**


 **Company**


 **Employee Activity**


 **Online Activity**


 **Sales Pipeline**


 **Orders**


 **Billings (AR)**


 **Returns**

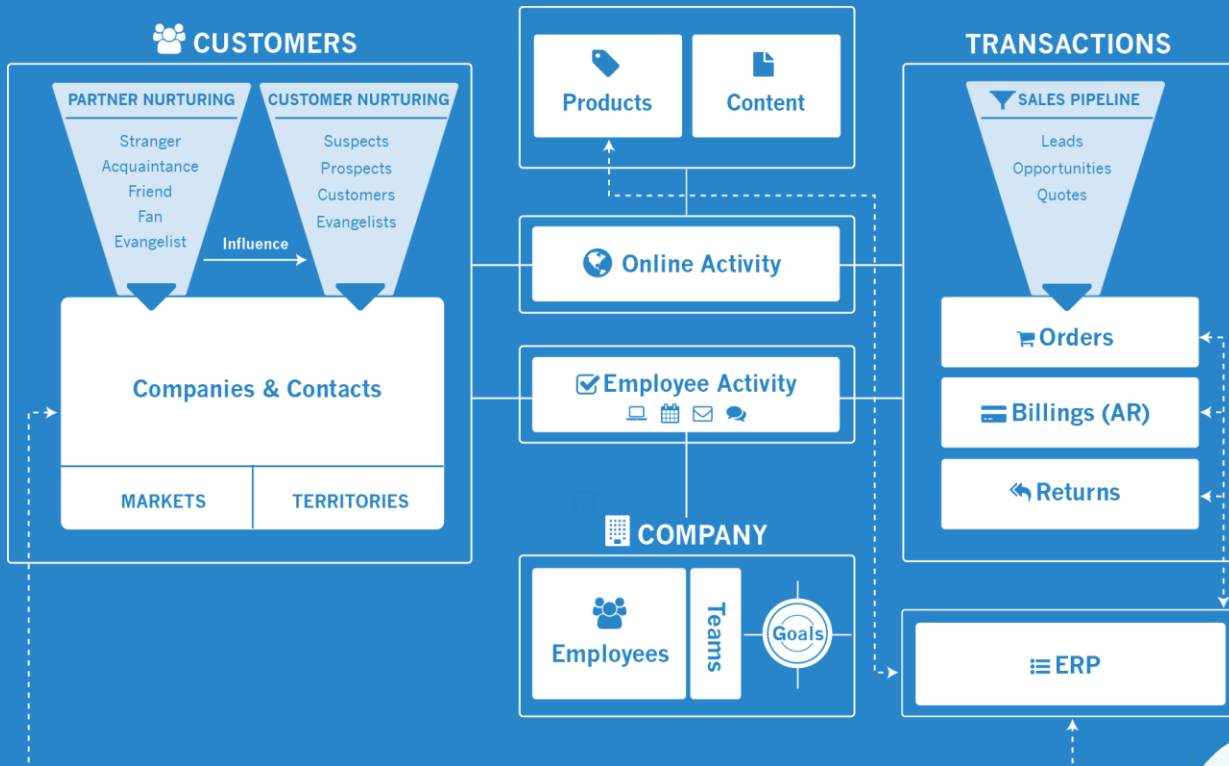
 **Products**

 **Content**

 **Developer Tools**

 **Training & Help**

 **CIMcloud App Store**



# CIMcloud – Major Parts

- Part 1 – Ecommerce (for Customers)
  - A: B2B Self-service Portal (B2B)
  - B: Public and Private Web Stores (Anonymous/Retail)
- Part 2 – CRM (for Employees)
- Part 3 – Data Integration Hub / API (for Apps)
- Platform
  - ERP Perfect Sync Framework
  - Control Panel / CMS
  - Cloud Data / SaaS Platform

# Part 1A – B2B Self-service Portal (for Customers)

The screenshot shows the desktop version of the WidgetCo B2B Self-service Portal. The interface features a dark grey sidebar on the left with a 'Menu' section containing links to Product Lists, Ordering, Orders & Shipments, Invoices, Payments & Credits, Returns & Claims, Reports, and Support & Resources. The main content area has a white background with the 'WidgetCo' logo at the top. Below the logo is a grid of nine service tiles, each with an icon and a brief description: Shop (Search and brows...), Price List (Check product pri...), Favorites Lis... (View and manage ...), Quick Order (Place orders using...), Orders (Track open, backo...), Shipments (View shipments a...), Invoices (Track open and pa...), Payments (View payments ap...), and My Account (View and edit billi...). The top navigation bar includes a search bar, a 'Products' dropdown, a 'GO' button, and user information for 'J. Hull @wspstest' next to a shopping cart icon showing 78 items. The footer contains navigation links (Home, Page 1, Page 2, Page 3, Page 4, Page 5, Contact), copyright information (©2015 Widget Company, Inc.), and a note about Ecommerce & ERP Integration by Website Pipeline.

WidgetCo

Shop  
Search and brows...

Price List  
Check product pri...

Favorites Lis...  
View and manage ...

Quick Order  
Place orders using...

Orders  
Track open, backo...

Shipments  
View shipments a...

Invoices  
Track open and pa...

Payments  
View payments ap...

My Account  
View and edit billi...

Home Page 1 Page 2 Page 3 Page 4 Page 5 Contact

©2015 Widget Company, Inc.  
Ecommerce & ERP Integration by Website Pipeline

The screenshot shows the mobile version of the WidgetCo B2B Self-service Portal. The interface is optimized for a smaller screen, featuring a top navigation bar with a hamburger menu, home icon, search icon, and user profile icon. Below the navigation bar is a large orange banner displaying 'Sales Today \$6,964'. Underneath the banner is a 'Sales History' section with a line graph showing sales trends from January to December. Below the graph is an 'Aging' section with a table showing current and 30-day sales figures. At the bottom, there is a promotional banner for 'Buy 2 more items on 3WID:1@4 to get 1' and a notification icon.

Sales Today  
\$6,964

Sales History  
View More

200  
150  
100  
50  
0

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

Aging  
View More

Current \$1,520,544

30 Days \$552,896


Buy 2 more items on 3WID:1@4 to get 1

# Part 1B – Public and Private Web Stores


[Home](#) [Page 1](#) [Page 2](#) [Page 3](#) [Page 4](#) [Page 5](#) [Contact](#)

# WidgetCo


[SHOP OUR PRODUCTS](#)  [GO](#) [SIGN IN](#) [SHOPPING CART 0](#)




**Excepteur sint occaecat cupidatat**  
Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum. [More Info](#)




**Gadget L - Stand-Alone Product (dangerous)**  
★★★★★



**Widget D - Parent with Input Qty View**








**Widget G - Parent with Four Choices**



**Widget A - Parent with One Choice**

xladmin01.webstorepackag.com/themodelsite/virtualweb

[View Larger](#)



SKU: GADL  
Category: Gadgets  
Brand: ABC Company

Downloads:  
[MSDS \(pdf\)](#)  
[Sales Flyer \(doc\)](#)

**\$102.78**  
[Qty Pricing](#)  
List Price: \$205.55  
You Save: 50.00%

Ordering from:  
CENTRAL WAREHOUSE  
40 In Stock

Qty :

[Add to Cart](#)

# Part 2 – CRM (for Employees)

The screenshot displays the Cimcloud CRM interface for a user named M. Super. The interface is divided into a left sidebar, a top navigation bar, and a main content area.

**Left Sidebar (Super User Menu):**

- Switch to Dashboard menu
- My Quick Access
- Customers
  - Suspect Lists
- Customers
  - Accounts
  - Accounts by Market
  - Contacts
  - Addresses
- Online Account Settings
- Partners (Channel)
- Store Locations
- Segmentation
- Login Rights
- Company
  - Employee Activity
  - Online Activity
- Sales Pipeline
- Orders
- Billings (AR)
- Returns
- Products
- Content

**Top Navigation Bar:**

- Search...
- Accounts
- GO
- M. Super (Superuser)
- Notification bell

**Main Content Area (Aperture Science):**

**Dashboard** | Statistics | Users | Addresses | Interactions | Activities | Quotes | Orders | Shipments | Invoices | Statement | Credits | Payments | Returns

**Log Activity** | Send Email | Make Call | Create Task | Schedule

**INTERNAL COMMENTS**

Start typing to log an activity...

**Call logged by Steven Hearndon** (9/08/2017 2:57 PM) [Edit](#)

Talked to Bob, Larry, and Dan.

[Show Notes \(1\)](#)

**Meeting logged by Steven Hearndon** (9/06/2017 1:11 PM) [Edit](#)

Had a meeting with Bob. It went well.

[Show Notes \(2\)](#)

**Activity logged by Steven Hearndon** (9/05/2017 4:57 PM) [Edit](#)

This is a new Activity

[Show Notes \(1\)](#)

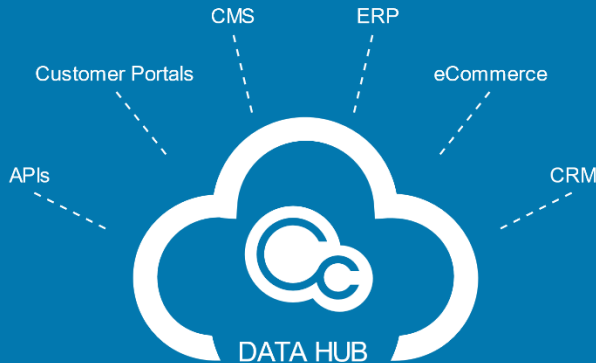
**Account Stats**

- > Open Orders: 17
- > Open Invoices: \$3,452.40
- > Shipments: 4
- > Returns: 2

**Contacts**

- Founder / CEO**  
  
**Cave Johnson**  
click or tap for more
- Artificial Intelligence**  
  
**GLaDOS**  
click or tap for more
- Test Subject**  
  
**Chell**  
click or tap for more

# Part 4 – Data Integration Hub (API)



### GET Methods

- Customer Accounts
- Orders
- Products
- Shipments
- Shipping Addresses
- POST Methods
- Special Calls
- Appendix

## GET Methods

A "GET" allows you to retrieve one or more existing resources from a collection of resources in the website platform.

All API GET methods are called using the following base URL and typically follow three standard format patterns.

**Base Request URL**

```
https://modadefn1.webstorepackage.com/themodelsite/virtualweb/api
```

**GET Method URL Formats**

- `[base-url]/[get-method-id]`  
Returns all resources from the collection(s) accessed within the scope of the method (GET methods may have built in filters to reduce the results returned from the collection(s) being accessed).
- `[base-url]/[get-method-id]/[property-value]`  
Only returns resources where the resource property specified by the GET method matches the value provided in the URL. The property used to filter the data collection is specified in the method's documentation.  
**Example** URL that gets resources from the products collection where the product category id property is `widgets`.  

```
https://modadefn1.webstorepackage.com/themodelsite/virtualweb/api/products/widgets
```
- `[base-url]/[get-method-id]/s/[searchstring]`  
Applies a complex filter to the request results based on the **SearchString** provided. See [supported SearchString commands](#) for more information on how to use SearchStrings.  
**Example** URL that returns all resources from the products collection where the status property is 1 and the name(nm) property starts with the letter "g".  

```
https://modadefn1.webstorepackage.com/themodelsite/virtualweb/api/products/widgets/s=searchexact=status=1and[searchleft=nm=1-g
```

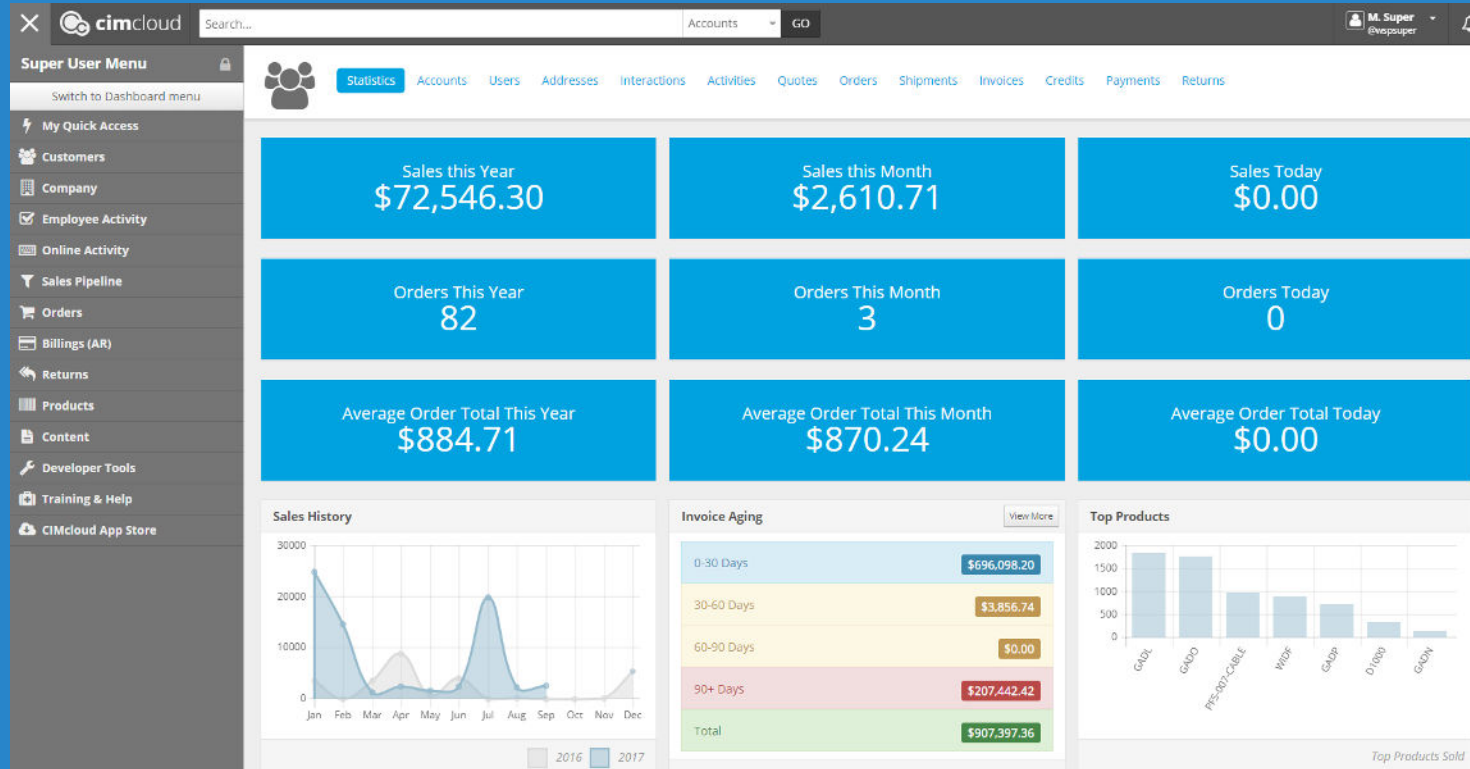
Some GET methods may require a **Token** request header in addition to the **Authorization** header. Depending on the method, the session linked to the token passed on the request may be required to be logged into a website user account. Reference the GET method's documentation for what token type is required for that method. For information on how to get a session token and log into a website session using the API, see the special calls [Session Create](#) and [Session Login](#).

### Customer Accounts

# Platform – ERP Perfect Sync™ Framework

- Automated
  - Bi-Directional
  - Incremental & Near-Real Time (up to Every 1 Minute)
  - Self-Auditing
  - Self-Correcting
  - 100% Accurate – Guaranteed
  - 13 Years & Millions of Dollars in R&D / Iterations
  - Moving ~ 3 Billion Records of Data Per Month
  - Data Flow Steps
    - Raw Record Fingerprint (detects adds, edits, deletes)
    - Translation
    - Payload (Sent) Fingerprint
    - Payload (Landed) Fingerprint
    - Nightly Audit (Fingerprint Match), Report, and Self-Correct

# Platform – Control Panel





# About Us

# About Us

- Based in Greenville, SC
- Cloud / SaaS Business Model
- CIM = Customer Interaction Management (CRM + Ecommerce + Your ERP)
- Timeline:
  - 2000 – Started: Custom Web-Based Software (Concepts Started in 1999)
  - 2009 – Exclusive Focus On ERP-Integrated B2B Ecom (first w/ Sage 100 ERP)
  - 2015 – Introduce Rep Enablement Tools w/ Ecommerce
  - May 2017 – Introduce CIMcloud Brand and CIM Software Category
- ERP-Integrated Ecommerce → Customer Interaction Management
- ~3 Billion Records / Mo Moving (between ERP & cloud)
- 70+ On Staff (2 in NC, 1 in CA, rest in Greenville, SC)

# About Us – Financials (Confidential)

- Revenue: Tracking \$9m in 2017 (\$8.2m in 2016)
  - 50% Professional Services
  - 30% Monthly Fees
  - 20% Software Setup Fees
- Boot-Strapped
- Profitable (barely, reinvesting free cash into R&D and CA)
- Debt Free
- 400+ Customers (most Sage ERPs, some Microsoft ERPs)
- Will Add ~ 60 Customers This Year
- Largest Customer < 2% of our Total Revenue
- 22% YOY Growth for Past 7 Years

# About Us - Accolades



In a very small group of privately held, bootstrapped, profitable companies on list



7 Years in a Row!  
(One of Only Six SC Companies)



# Pricing Model

# Pricing Model Overview

- Total Pricing Includes
  - Software Setup (flat one-time fee)
    - Base Package + Optional Modules + Service Level + Standard Implementation
  - Professional Services (hourly, for actual hours only, billed weekly)
    - Project Management, Training, Support, Custom Design, Custom Development, etc
  - Monthly Cloud Services Fee (starts at order completion)
- Typical Price / Project
  - \$25k to \$200k setup (60% services, 40% software setup)
  - + \$700 to \$3,000 / month
  - Can Vary Significantly by Scope

# Product Investment Priorities

# Product Investment - Features

- Enterprise Product Search (3Q 2017)
- CRM Features - Part 1 (3Q 2017)
  - Interaction / activity tracker (employee + custom side)
  - Interaction log (goal = collect & display 100% of all customer interactions)
  - Email / calendar integrations
  - Text / SMS integration
  - Collaborative quoting with interaction logging
- CRM Features - Part 2 (4Q 2017 & 1Q 2018)
  - Task tracking / case management
  - Phone Integration (click to dial, screen pops)
  - Goal / Metric Tracking
  - Leads / suspects
  - Pipeline / funnel (opportunity) management
  - Custom fields (by CRM users)



# Product Investment – Technology Stack

- Perfect Sync (guaranteed, audited, and reconciled 100% accuracy)
- Rebranded / Re-organized Control Panel (Web Driver → CIMcloud)
  - Training & Marketing Assets
- Rollout of API-first, JS front end (modernize rest of framework)
- Cascading customizations / scaffolding
  - Separated from core version upgrades
- Open to 3<sup>rd</sup> party developers / ecosystem
- Additional ERP Integrations (TBD)



---

**CRM + ECOMMERCE + <sup>Your</sup> ERP**  
--- One Platform ---

Questions?