

INNOVATE 2017

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VISION & ROADMAP



Simon Tindal, CTO

Geoffrey Niven, VP Product Management



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When you last
received a
communication,
was it...



On your preferred channel (print, email, web)



Personalized & Relevant



Interactive



Real-time



Enabling a 2-way conversation

SMART SOLUTIONS

SMARTCOMM™

Personalized.

Our flagship product, SmartCOMM is the choice of hundreds of companies to create, manage and deliver personalized customer communications that align with the customer journey.

SMARTCORR™ for salesforce

Seamless Control.

An altogether better way to engage customers and increase business productivity. SmartCORR for Salesforce allows you to work seamlessly within and leverage data from the Salesforce environment.

SMARTDX™

Trade Simplified.

All of the G15 investment banks and some of the world's largest energy and commodity companies trust SmartDX to help them simplify trade and relationship documentation for all market participants, across all asset classes and product types.

SMARTCaaS™

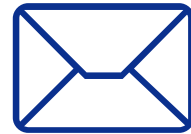
For Partners.

The only multi-tenant SaaS provider with an embedded Correspondence as a Service ('CaaS') offering. Our partners seamlessly connect to our services to enhance the quality of communications available to their customers.

INNOVATION THEMES



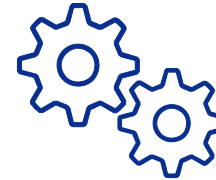
Mobile



Email



User Experience



Content Assembly



Collaboration



Deployment Flexibility



Intelligence Information



Enterprise Integration



CAAS Strategy

SC16 RELEASE HIGHLIGHTS



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SC16 RELEASE THEMES HIGHLIGHTS



Mobile

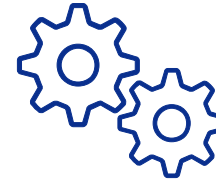


Email

HTML Preview
Email Client Testing



**User
Experience**



**Content
Assembly**



Collaboration

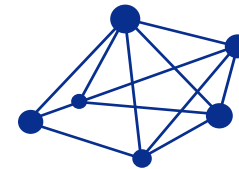


**Deployment
Flexibility**

Docker



**Intelligence
Information**



**Enterprise
Integration**

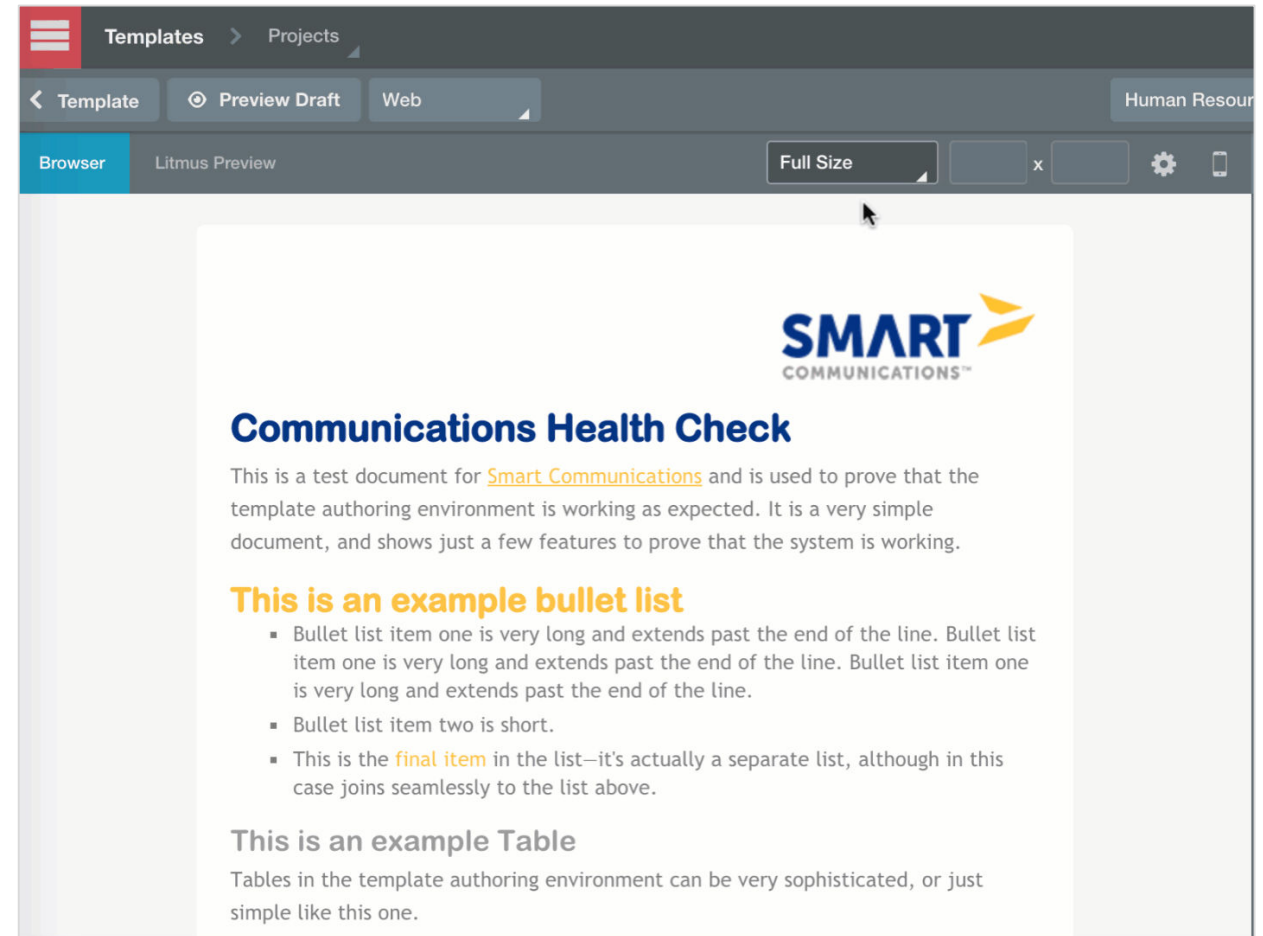


**CAAS
Strategy**

RESPONSIVE HTML PREVIEW



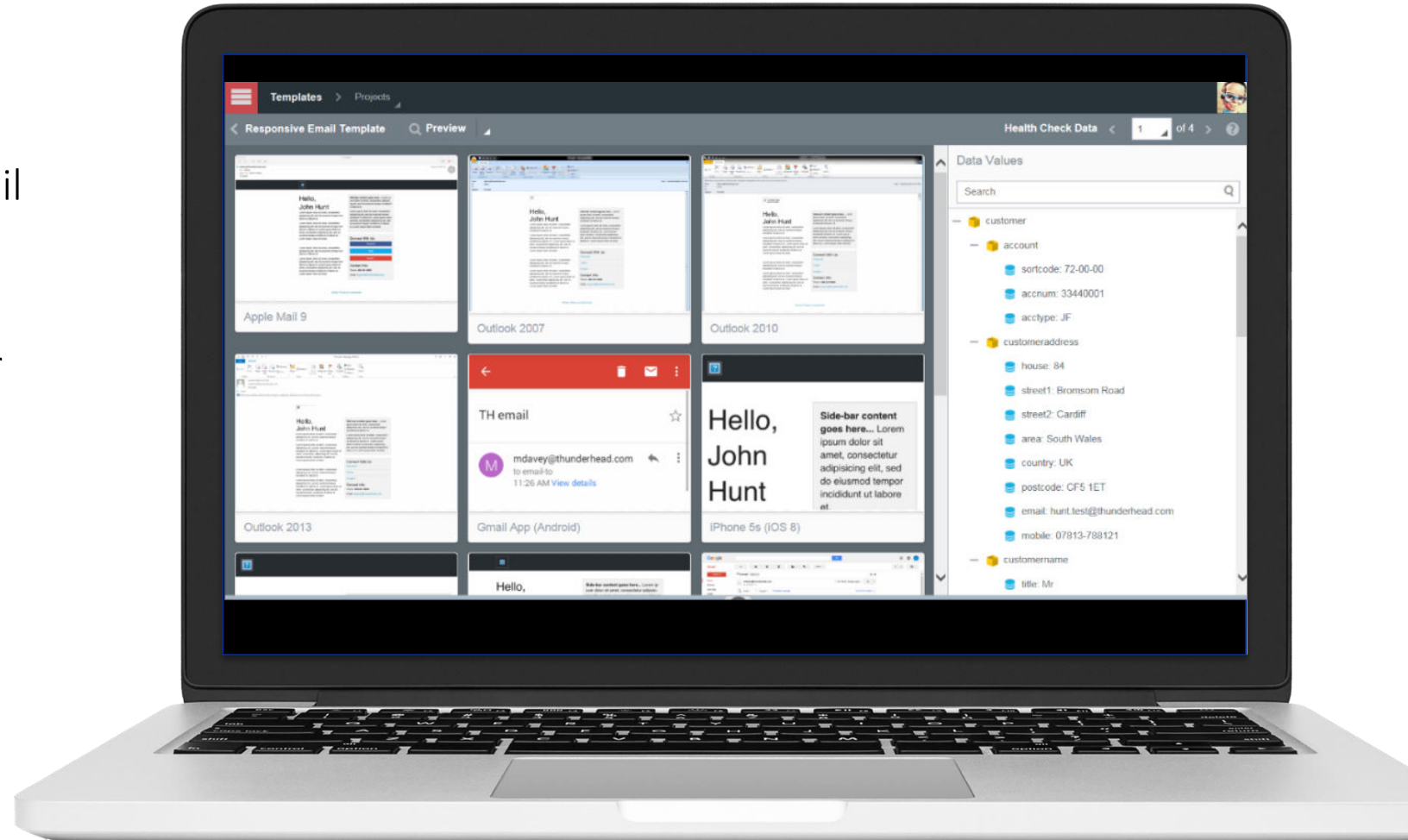
- Template Preview now allows you to see your previews at different screen sizes to test the responsiveness of your content



EMAIL CLIENT TESTING



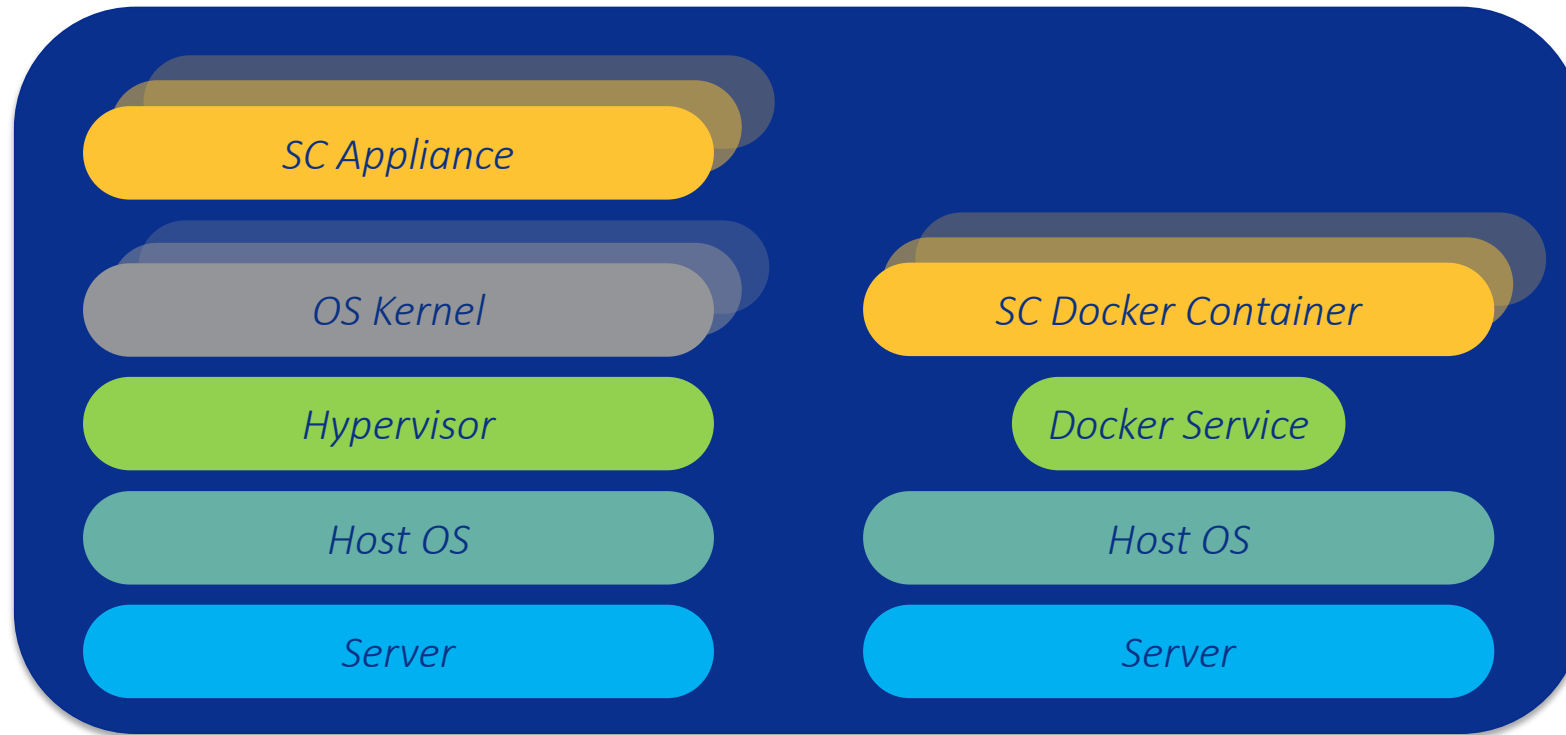
- Preview of HTML output on 50+ email clients, devices and browsers
- Embedded within Template Designer
- Uses Litmus Preview SaaS service



DEPLOYMENT FLEXIBILITY



Docker Appliance



Hypervisor Appliance

Docker Appliance

API Wrapper for Virtual Software Appliance

Suitable for highly automated, high-scale environments

SC17 RELEASE HIGHLIGHTS



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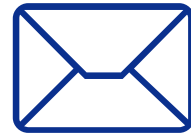
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SC17 RELEASE THEMES HIGHLIGHTS



Mobile

- Smart Components
- Device Preview
- CSS Handling



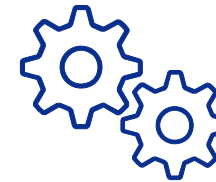
Email

- TLS Email Delivery



User Experience

- Borders & Shading
- Word Copy & Paste
- Output Config
- Smart Search



Content Assembly

- Rich Content SmartCORR
- Endpoints SmartCORR
- WordML footnotes



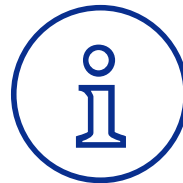
Collaboration

- Data Extraction
- Audit Reports
- Improved Search



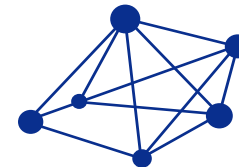
Deployment Flexibility

- Cloud Batch Service
- Appliance script security



Intelligence Information

- Transaction Reports



Enterprise Integration

- Docbox Wrapper

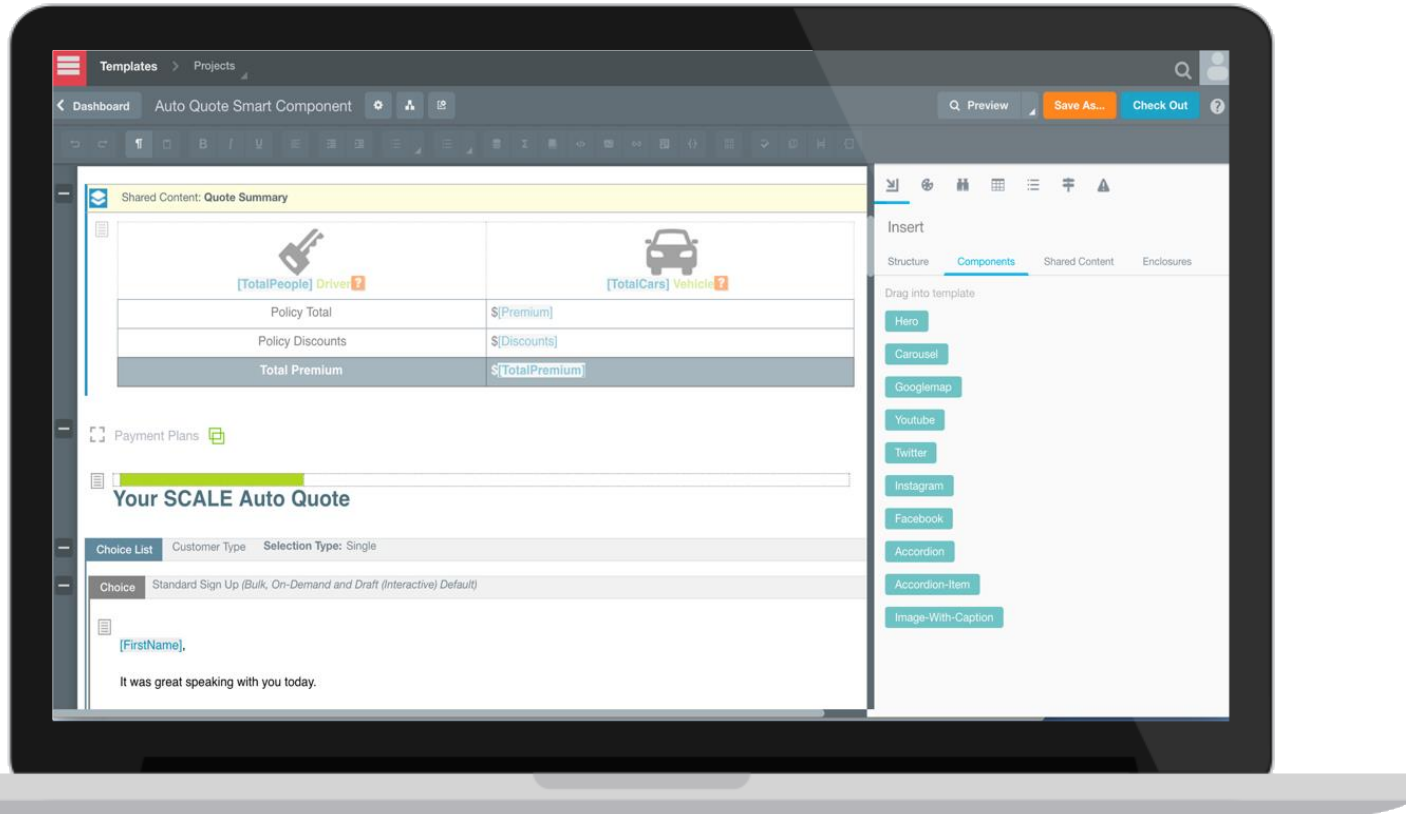


CAAS Strategy

- SmartCORR Lightning

'New'

SMART COMPONENTS



- Business users can build rich and engaging content for embedding into mobile apps and full HTML websites
- Components can be driven by data items and wrapped in logic to make for a highly personalized experience
- Ideal for interactive, content-centric communications such as on-boarding communications, notifications and terms of business

SMART COMPONENTS


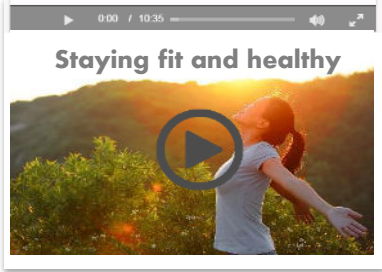



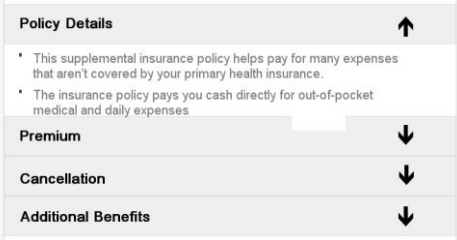
Image 'Carousel'




Video Control




Social Media Toolbar



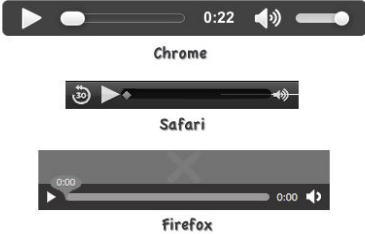
Accordion



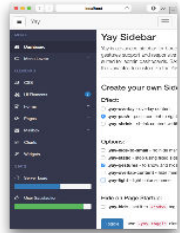
Light Box



Form Filling

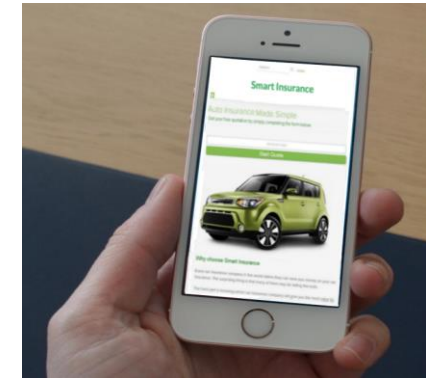
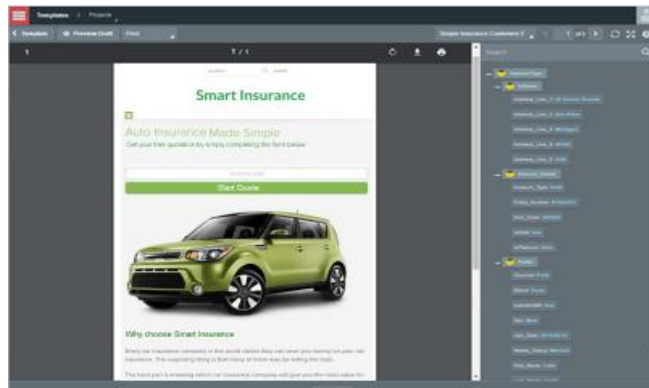


Audio



Sidebar

DEVICE PREVIEW



1 Preview Template

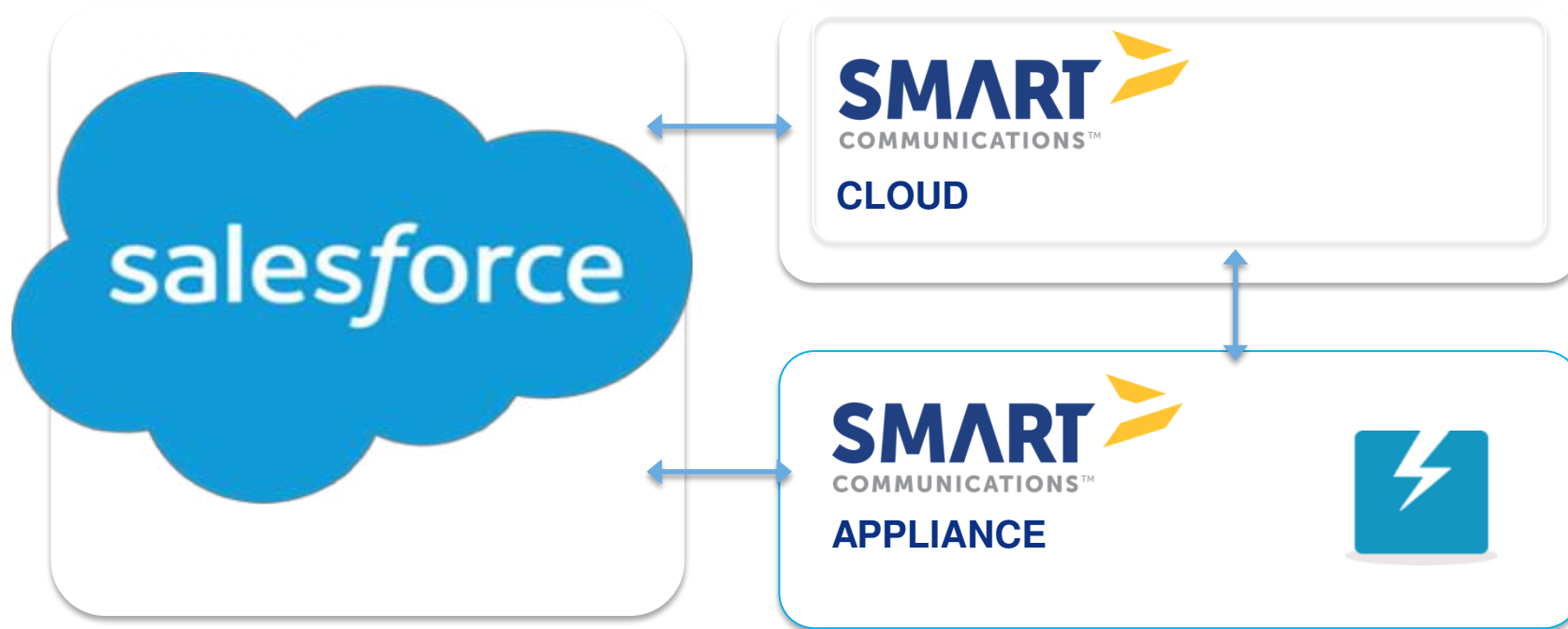
2 Link to device via QR code

3 Preview on device

DEPLOYMENT FLEXIBILITY



SmartCORR™ Support for High-Volume Batch



IMPROVED COPY & PASTE FROM MS WORD AND EXCEL

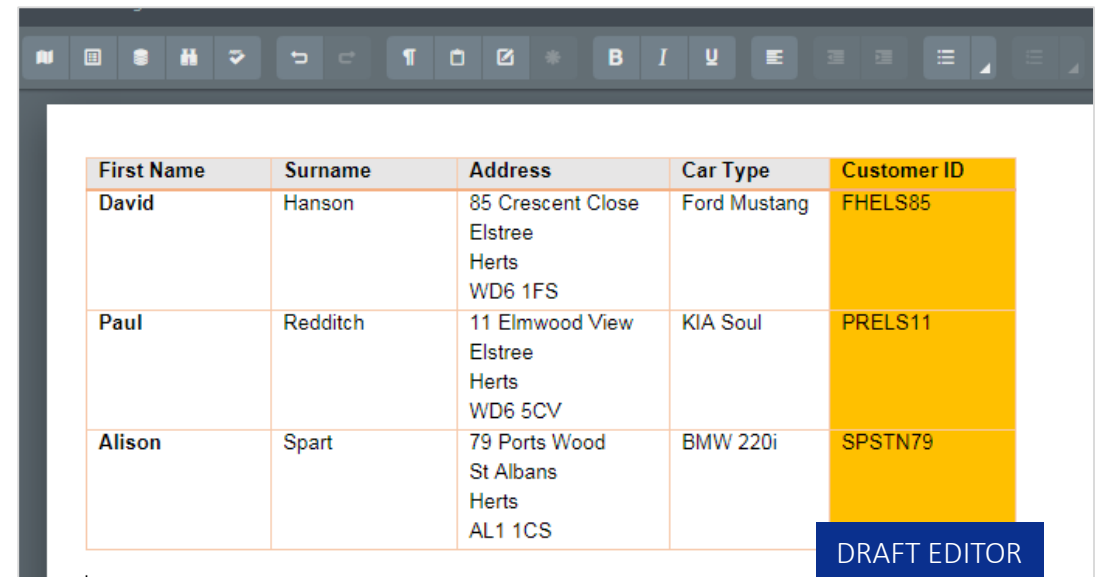
Much improved 'Copy and Paste' from MS Word and MS Excel 2010/13/16 into Template Editor and Draft Editor

Retains as much formatting as possible, including:

- Borders & Shading
- Structure, including embedded tables and merged cells

First Name	Surname	Address	Car Type	Customer ID
David	Hanson	85 Crescent Close Elstree Herts WD6 1FS	Ford Mustang	FHELS85
Paul	Redditch	11 Elmwood View Elstree Herts WD6 5CV	KIA Soul	PRELS11
Alison	<u>Spart</u>	79 Ports Wood St Albans Herts AL1 1CS	BMW 220i	SPSTN79

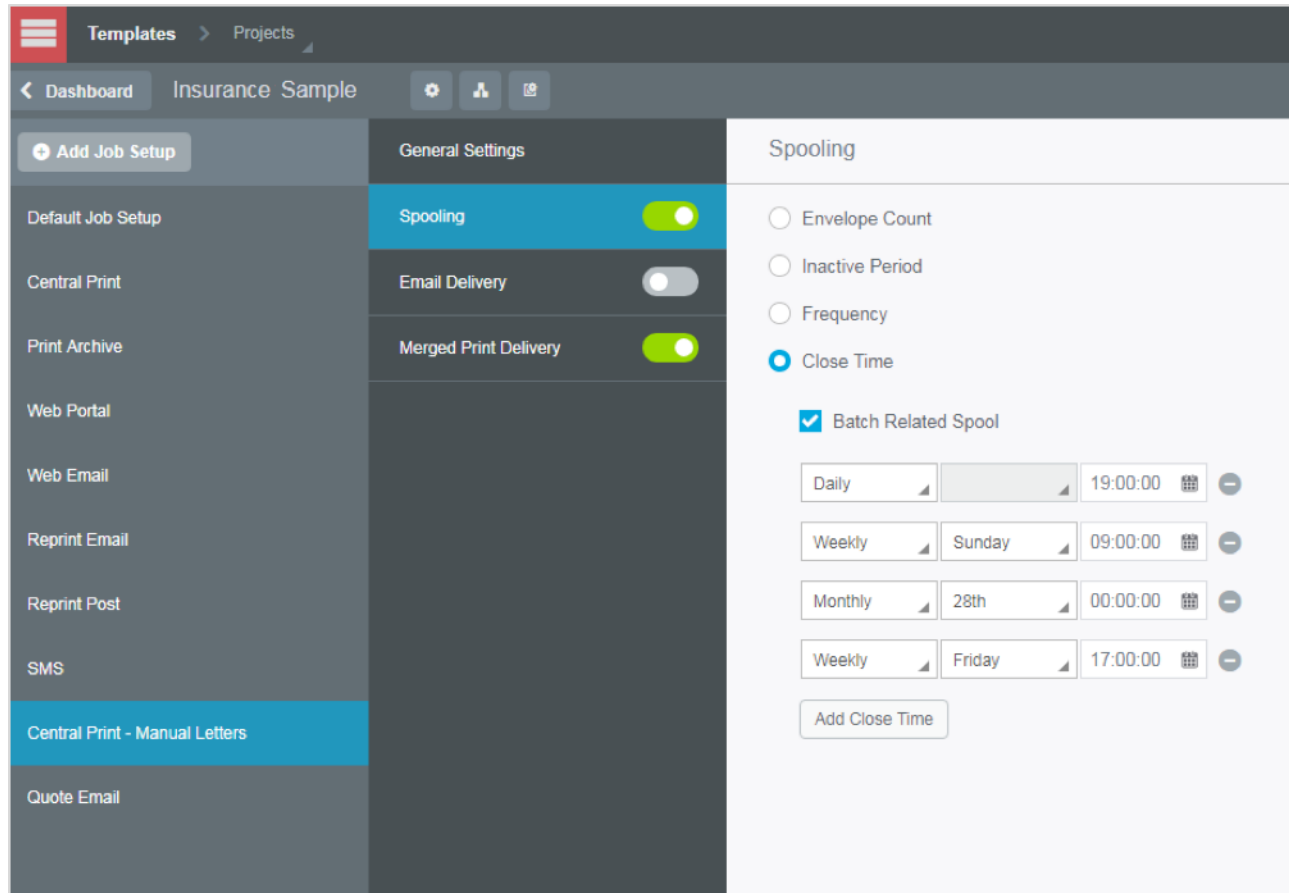
MICROSOFT WORD



First Name	Surname	Address	Car Type	Customer ID
David	Hanson	85 Crescent Close Elstree Herts WD6 1FS	Ford Mustang	FHELS85
Paul	Redditch	11 Elmwood View Elstree Herts WD6 5CV	KIA Soul	PRELS11
Alison	<u>Spart</u>	79 Ports Wood St Albans Herts AL1 1CS	BMW 220i	SPSTN79

DRAFT EDITOR

NEW OUTPUT CONFIG EDITOR



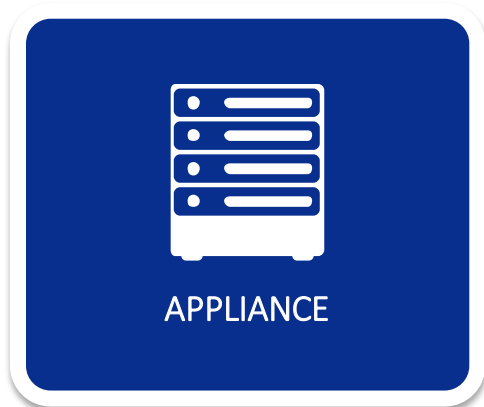
- New UI simplifies design and maintenance of these resources
- Initially, just for email and simple print stream use cases, but more coming in subsequent releases

CLOUD BATCH—FULLY LIVE

LICENSABLE FEATURE

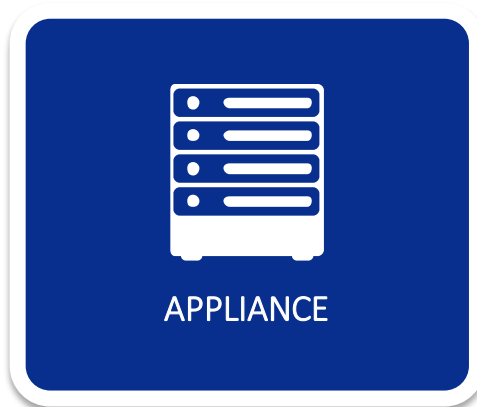
Batch Models:

Client Site



- Protection of PII within firewalls
- Local control of compute model
- Customer managed

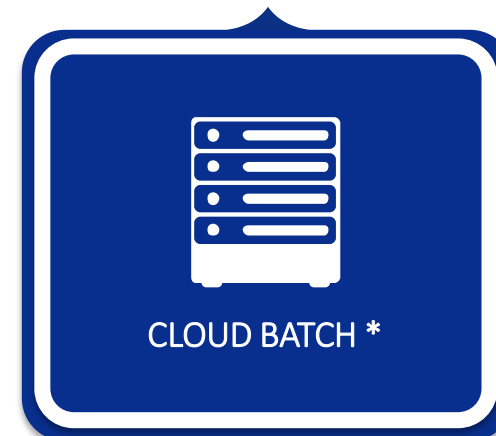
Amazon / Azure



- Public cloud low TCO
- On-tap scalability, resulting in true PAYG
- Customer managed



Smart Communications Cloud



- Smart Communications industry leading levels of compliance and security
- Complete 'service' offering

* Cloud Batch is currently only available from our US data centers. Further support is coming soon for other regions.

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SMARTCORR™ FOR SALESFORCE: FULL SUPPORT OF LIGHTNING MODE—THE LIGHTNING SASH

- SmartCORR for Salesforce now fully operates in Lightning UI mode
- Users no longer need to run Classic Mode to use any part of SmartCORR for Salesforce
- SmartCORR for Salesforce v7 expected to receive the SFDC Lightning Sash accreditation once it is generally available

The screenshot shows the Salesforce AppExchange page for the 'Smart Communications SMARTCORR™ for salesforce' app. The page features a green header with the app name and a dark blue banner with the text 'Enterprise-class communications without enterprise com'. Below the banner, there is a blue 'APP' badge and a 'Lightning Ready' badge with a lightning bolt icon, which is circled in red. The app description reads 'SmartCORR for Salesforce Create, personalize and deliver customer communications within Salesforce' and includes a 5-star rating with 38 reviews.

SMART SEARCH FOR TEMPLATE DESIGNER

Completely rewritten search capability for Template Designer using powerful new search engine:

Wild Cards

qu?ck bro*

Fuzzy Searches

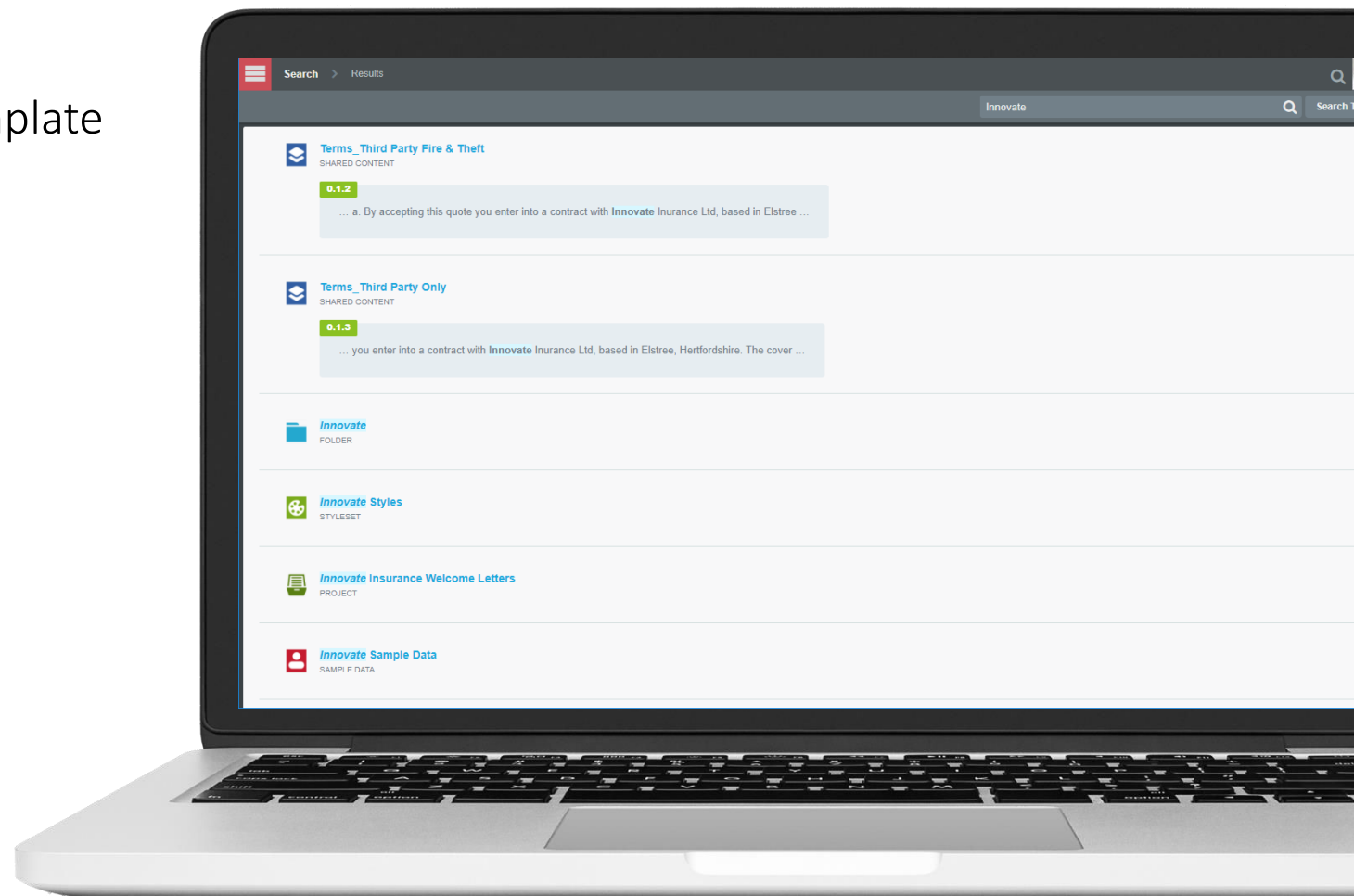
quikc~ brwn~ foks~

Proximity

"fox quick"~5

Grouping

(quick OR brown) AND fox



Available Q4 2017

EVOLUTION OF CCM

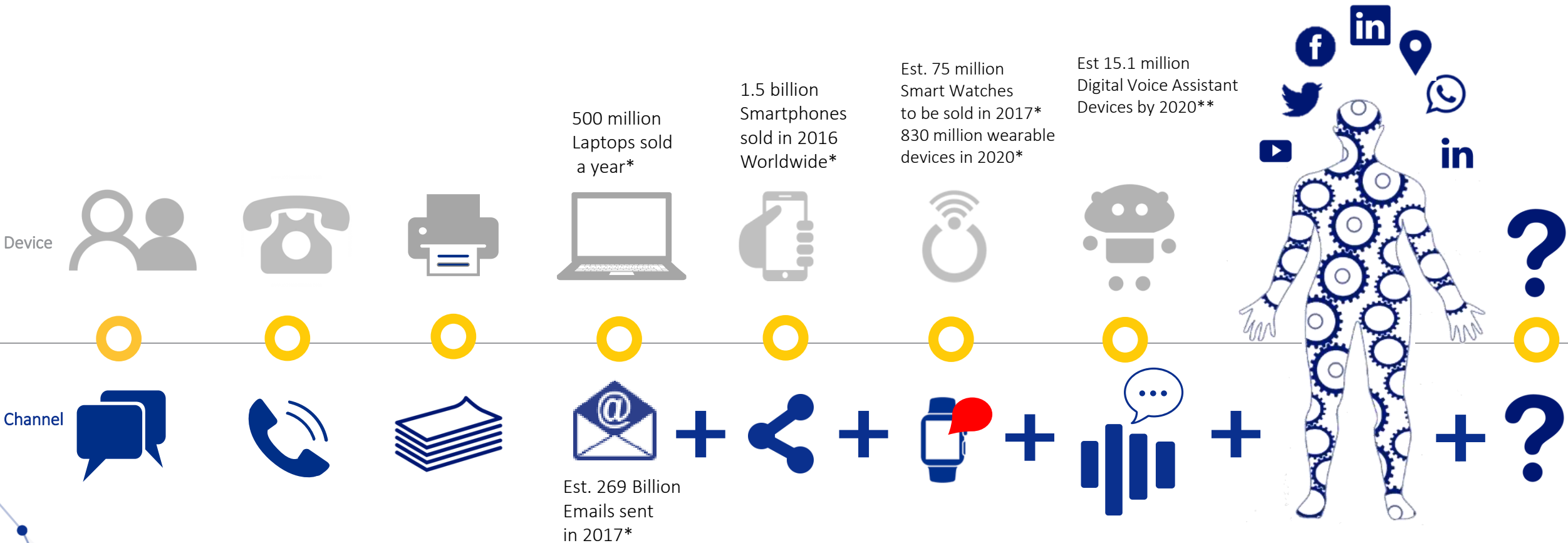


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DIGITALIZATION OF COMMUNICATIONS



Est. 269 Billion Emails sent in 2017*

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Sources: *Statista **2016 Strategy Analytics

STRATEGIC VISION

Conversation Cloud



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CCM SPACE IS EVOLVING

The Digital Transformation



Large enterprise customers and prospects have digital transformation initiatives happening and are asking us, as a CCM vendor, to be part of a larger ecosystem and do things that CCM has not traditionally been able to do

RFI & RFP Evidence



Over the past 9+ months, we have received many RFIs and RFPs that are CCM focused, yet contain requirements going beyond the traditional capabilities of CCM

Analyst Inquiries



During Analyst inquiries with Gartner, Forrester, Celent, Keypoint Intelligence and others, we're learning their clients are asking which CCM vendors to shortlist and whether those vendors can also do other things

Flexible Communication



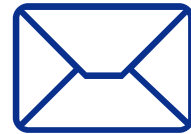
Consumers are demanding conversations on the channel of their choice, when and how they want them

RELEASE THEMES CANDIDATE HIGHLIGHTS



Mobile

- Smart Components



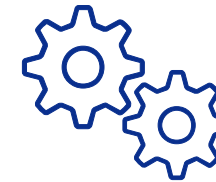
Email

- Tracking
- Delivery



User Experience

- Excel Charts UI
- Content Assembly Tree
- Scripting
- Import Layouts
- UI Enhancements



Content Assembly

- Conversation History Rules
- Validate



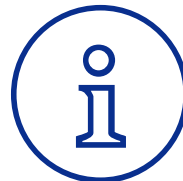
Collaboration

- Wet Signatures
- Tri-Party Agreements
- Purging of Docboxes



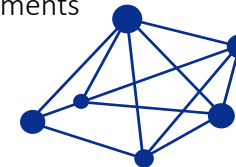
Deployment Flexibility

- Cloud Batch Service 2.0



Intelligence Information

- Smart Search
- Purging
- Conversation History



Enterprise Integration

- Push Notifications
- Email Tracking
- Workflow

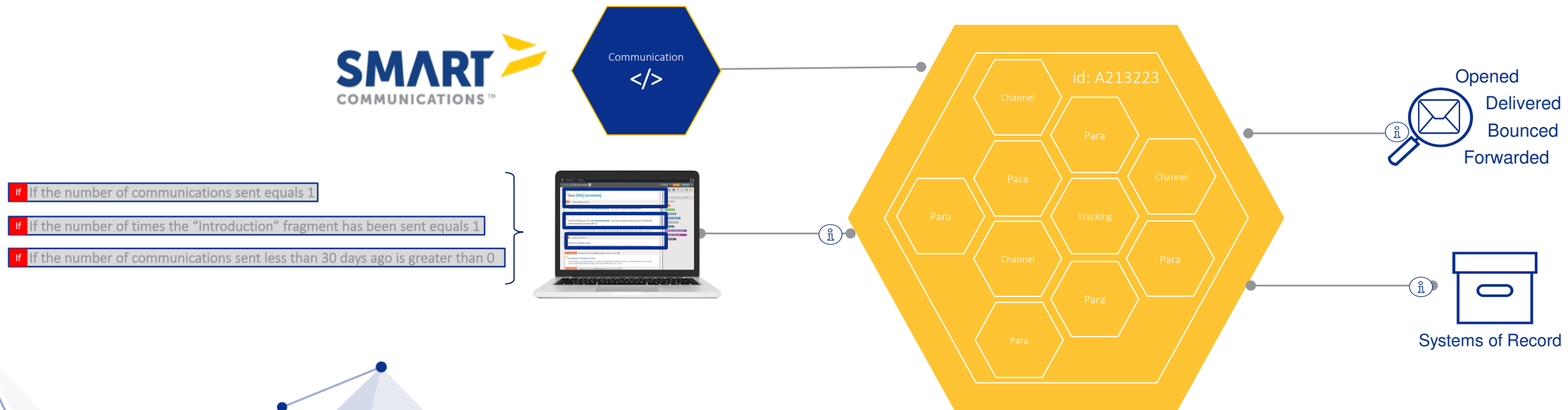


CAAS Strategy

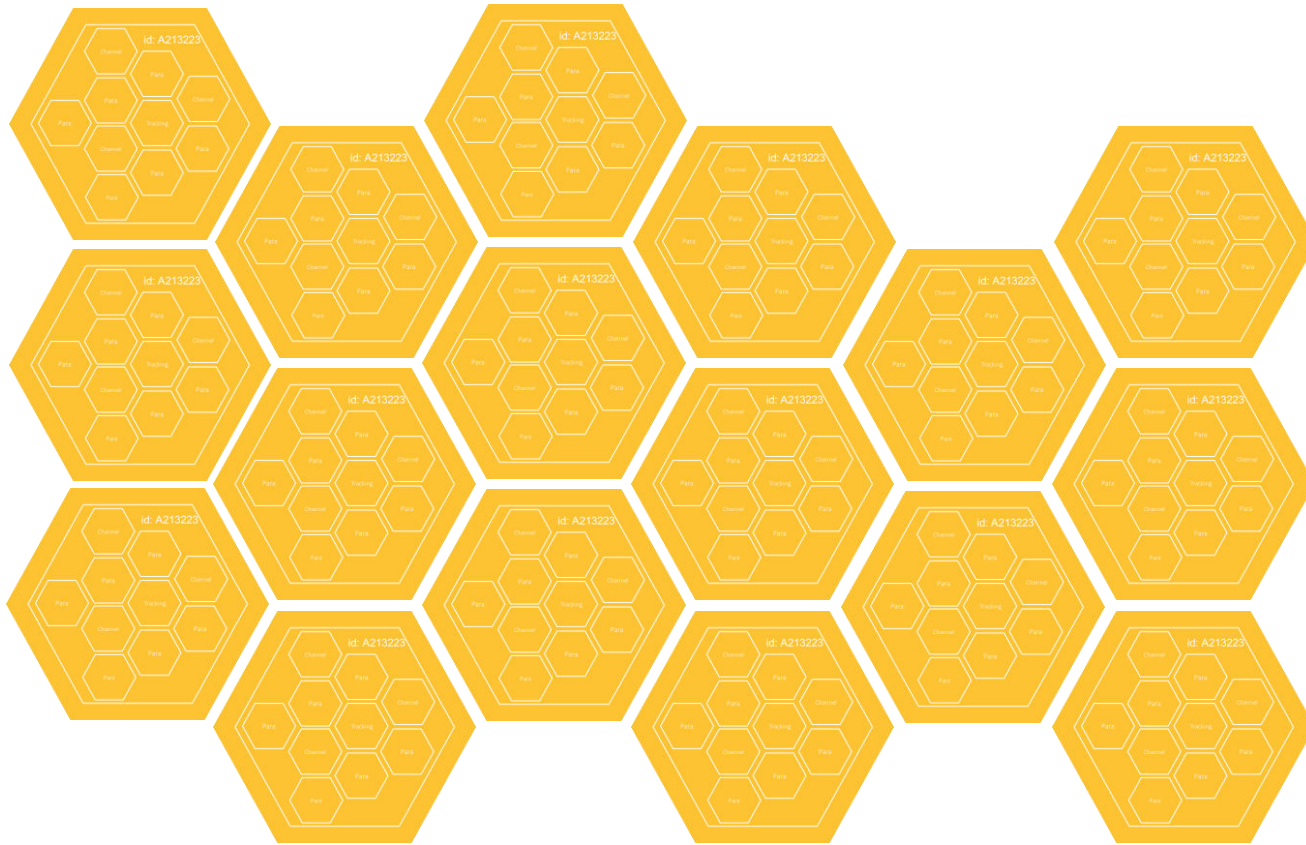
- SmartCORR™ Projects

CONVERSATION HISTORY

- Unification of communications across lines of business
- Enables hyper-personalization and sophisticated cross-selling messaging
- Insight into content usage
- Insight into the channels that work best for the customer
- Updates from 3rd Party applications
- Risk & exposure enabled by knowing what you sent to your customers



CONVERSATION HISTORY OVER TIME



Provides knowledge of

- What has been sent
- When it was sent
- How it was sent



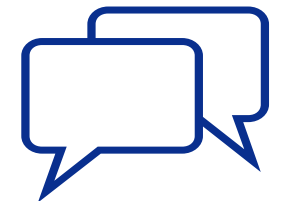
Enables tracking

- Status
- Effectiveness
- Risk & Compliance



Ensures the next time you have a conversation

- It's contextual
- It's compliant
- It's hyper-personalized



CONVERSATION CLOUD

In Practice



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CONVERSATION CLOUD USE CASE



Business Trigger –Renewal policy triggered from legacy system



Enrich - Transaction data enriched



Compose & Send - Email sent to the customer



Record - Contents of the policy stored



Track - Email tracked to see if it was delivered and opened



Update - Update the outcome

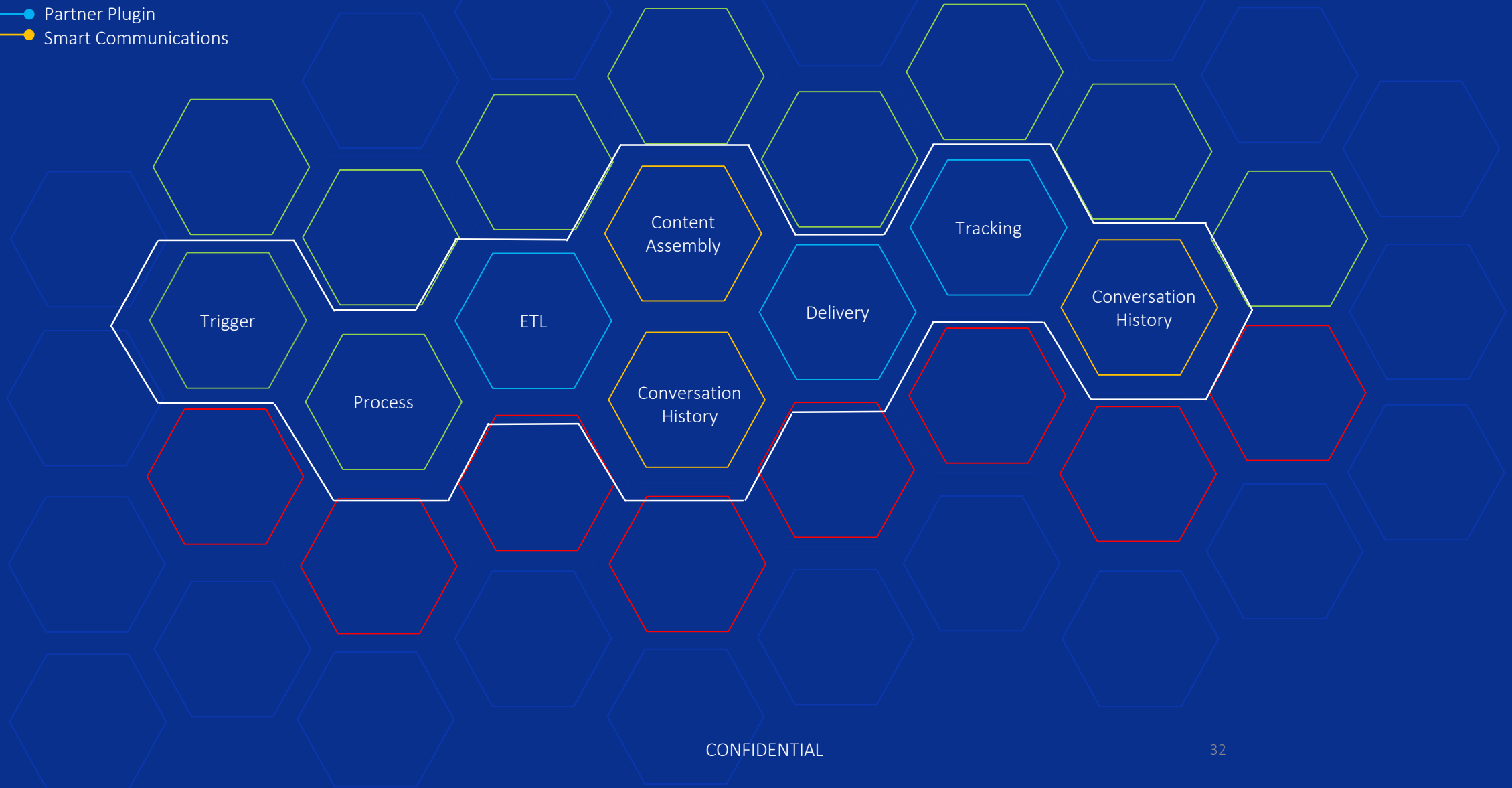
CONVERSATION CLOUD USE CASE

- Partner Plugin
- Smart Communications



CONVERSATION CLOUD

- Partner Plugin
- Smart Communications





How would *your* customers rate your communications?



Are you delivering communications on their preferred channel?



Are they personalized & relevant?



Can they interact?



Are they in real-time?



Do they enable a conversation?



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