

Building Client Relationships Has Lots of Moving Parts!

But, using “out of box” tools has unintended consequences...

- Paying 40% or more for tools you don't need.
- Decreasing your team's operational efficiency by 80% or greater
- Prohibiting Your ability to compete and grow by upwards of 250%

The challenge is these “out of box” systems weren't built with your business in mind, so you constantly make sacrifices to add the next tool, and still can't find all the things you need.



It's Time for a Change, Meet the Trutelic iOP.

An integrated Operating Platform that seamlessly manages marketing, sales, and service with a LEAN support, operations, and supervisory framework; fully tailored to your business.

It's the first platform designed to connect your key people, processes, and business systems—empowering your team to stay focused on high quality client experiences.

Our Tailored Solutions are Driven by 3 Engines.

The Trutelic iOP™

- Our innovative platform is your LEAN operating hub to manage the key strategies, activities, content, best practices, support, and supervisory activities.

The Recommended Day™

- A productivity and priority focused interface that automates your team to design strategies, manage priorities, and execute tasks from a SINGLE place.

The Athena Business Cloud™

- LEAN analytics dashboard with leading indicators and proactive notifications delivered in real-time to support proactive continual improvement efforts.



TRUTELIC

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Stop juggling off the shelf systems... get one platform that's tailored for you and empowers your business.

The Trutelic iOP Drives Lean Organizations!

| Our Integrated Features | Feature Descriptions <small>A Lean Operating Interface focused on Productivity!</small> |
|---|--|
| Strategy and Teamwork Management | Marketing, Sales, Service, and Operations Program Management |
| Multi- Channel Digital Communications | Blog, Mobile, Video, Social Media, Press, and Newsletters Publishing |
| Contact Relationship Management | Segmented Contact Interface for Employees and Clients |
| Content Marketing Automation | Create, Edit, Review, and Publish Digital Communications |
| Responsive Mobile Websites | Mobile Optimized Websites to drive SEO and Lead Capture |
| Intelligent Business Process Management | Task Assignment, Operation Workflows, and Content Support |
| Regulatory Compliance Management | Multi-Stage Supervisory Workflow and Auditing |
| Knowledge and Collaboration Management | Training, Content, Best Practice, and Key Resource Repositories |
| Machine Learning Business Intelligence | Real-Time Leading Indicator for Continual Improvement |
| All Features Available and Configurable to the Needs of Firm and Front Line Teams | |

Service and Support Options to Ensure Success!

| Special Features | Virtual Support <small>The system helps you drive strategy and performance</small> | Business Support <small>We help you configure strategic programs and updates</small> | Premium Support <small>We work within your strategic team to drive performance</small> |
|--|---|---|---|
| Trutelic iOP Installation | Systematic Approach | Virtual Approach | In-Person Tailored Approach |
| Support Case Management | Unlimited Cases | Unlimited Cases | Unlimited Cases |
| • 1 st Priority Cases | 4 hours | 1 hour | 30 minutes |
| • 2 nd – 4 th Priority Cases | 8 hours | 4 hours | 2 hours |
| Operating Hours | 8-6 M-F | 8 – 6 M-S | 24x7 |
| Updates and Enhancements | Yes | Yes | Yes |
| Client Success Manager | On-Screen Helpdesks | On-Screen Chat | Direct Support Phone # |

Contact us today to learn how Lean Digital Transformation can help you!

Toll free: 866.217.5998 • trutelic.com