

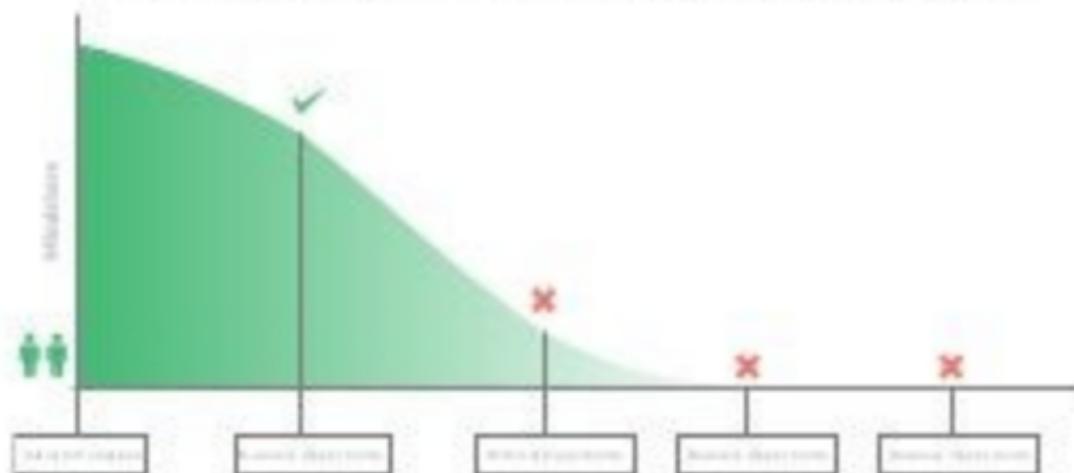


Contactually powers great relationships.
CRM for Professional Services

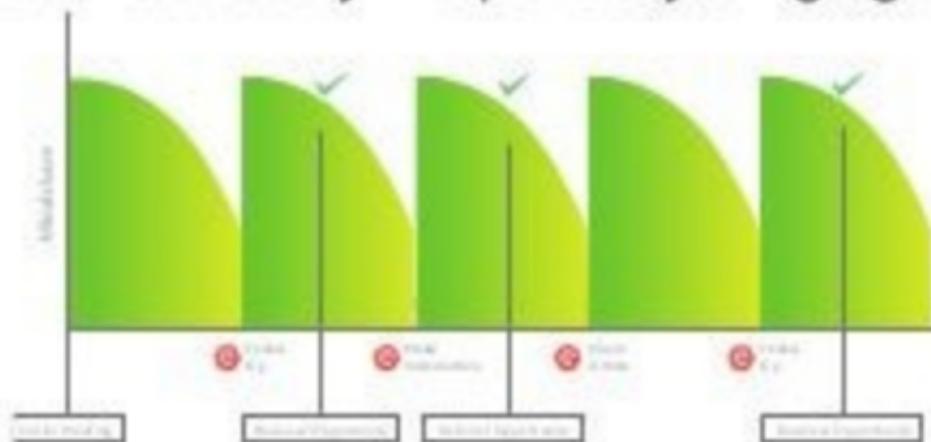
Zvi Band, CEO

Relationships power amazing

For the 7.8M in professional services (real estate, legal, financial services), referrals drive 85% of business - staying in touch is critical.



Contactually helps stay engaged



- Active Contactually users report a **34% increase** in the number of referrals they receive annually
- Within 3 months of joining, Contactually users **engage with 97% more people** in their network than before



We make it easy and engaging to stay in

The screenshot displays the Contactually CRM interface. The main area shows a list of contacts with columns for name, email, phone, and status. A sidebar on the left contains navigation icons for various contact management functions. On the right, a summary dashboard includes a donut chart showing contact distribution (e.g., 100% in one category, 0% in another) and a list of key metrics such as 'New Leads', 'Open Leads', and 'Closed Leads'.

Name	Email	Phone	Status
John Doe	john.doe@example.com	(123) 456-7890	Active
Jane Smith	jane.smith@example.com	(987) 654-3210	Lead
Bob Johnson	bob.johnson@example.com	(555) 111-2222	Lead
Alice Brown	alice.brown@example.com	(444) 333-4444	Lead
Charlie Davis	charlie.davis@example.com	(333) 222-3333	Lead
Diana Prince	diana.prince@example.com	(222) 111-2222	Lead
Edward Nigma	edward.nigma@example.com	(111) 000-1111	Lead
Fiona Glenanne	fiona.glenanne@example.com	(000) 999-0000	Lead
Greg Kelp	greg.kelp@example.com	(999) 888-9999	Lead
Hank Scorpio	hank.scorpio@example.com	(888) 777-8888	Lead
Ivy	ivy@example.com	(777) 666-7777	Lead

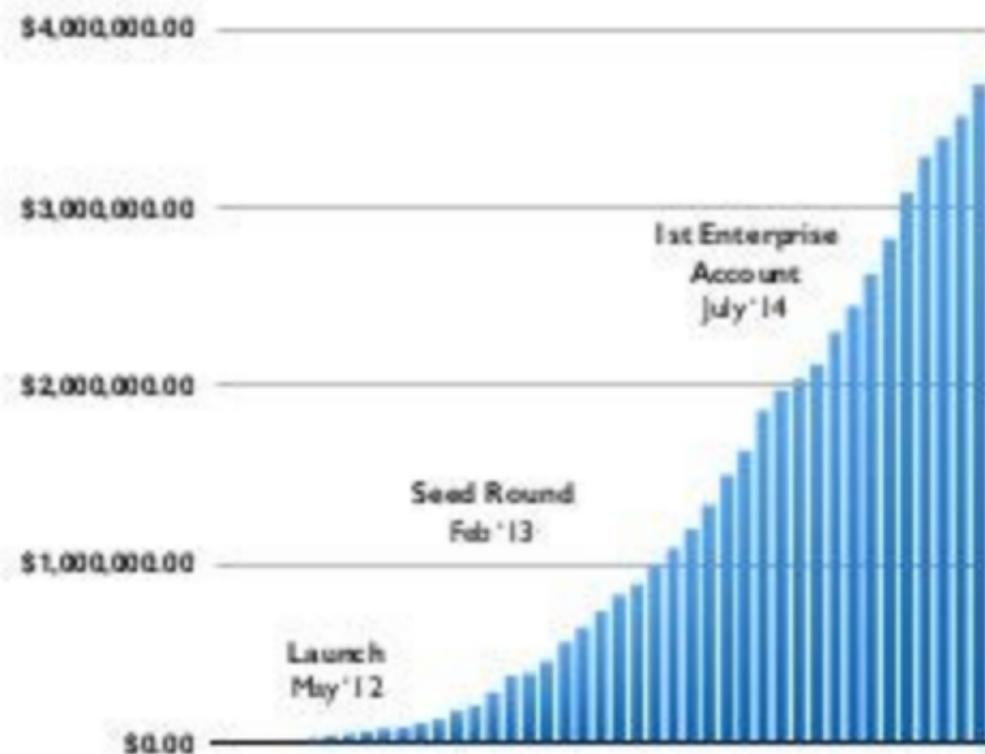
Summary Dashboard:

- Donut Chart:** Shows 100% in one category and 0% in another.
- Key Metrics:**
 - New Leads: 100
 - Open Leads: 200
 - Closed Leads: 300
 - Lead Conversion: 15%
 - Lead Response Time: 24h
 - Lead Source: 100%
 - Lead Quality: 100%
 - Lead Score: 100

And now provide insights for the team



Current ARR = \$3.68M



Capital Raised
\$3.5M

Received Oct 2011

% ARR from Enterprise
0 to 16%

Growth over last 12 Months

Enterprise Net Churn
-2.5% MoM

Avg Net ARR Churn

Total Net Churn
3.1% MoM

Net ARR Churn

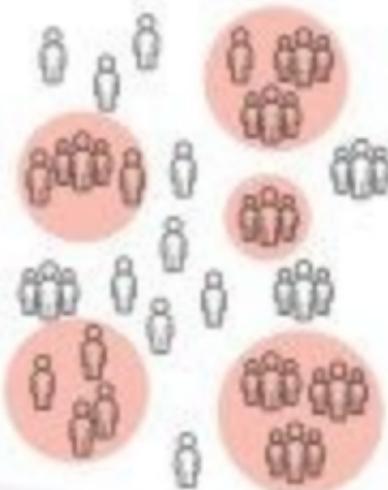
We sell initially to individuals ... and upsell into the Enterprise

Primary Acquisition Channels

Content, SEO, Partners (95% not-paid)

CAC: \$140 LTV: \$1,247 ACV: \$508

Average ACV: \$80K



Customer Success +
Setup fee \$0 to get you set

RE/MAX

kw | **ELLERRE WILLIAMS**

FIRSTTEAM
REALTY

RE/MAX **RE/MAX**
BAIN SEAL

Z
RE/MAX

kw **NEW YORK CITY**
RE/MAX



We're going after the gap in a growing



The CRM market is forecasted to swell to \$36.5B in the next two years.

Less than half of professional service providers use a CRM.

Why?

Existing CRMs are not built to drive bottom-up adoption with end users

Fundamentally different model of CRM needed (non transactional database)



We've raised \$3.5M in capital,
here's where we go next

Product

- Data insight team to bring key insights and reduce user action
- Build in-demand feature set for teams and enterprise
- Expansion of mobile team and roadmap

Growth

- Expansion of enterprise sales practice
- Capture more customers in enterprise and SMB
- Develop additional markets in professional services





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Search contacts | Dashboard | Contacts | Buckets | Insights | Programs | Pipelines

My Actions

[Add Task](#) | [Add Contact](#) | [Merge Contacts](#) | [View Messages](#)

[Current \(11\)](#) | [Follow-ups \(10\)](#) | [Actions \(1\)](#) | [Snoozed \(4\)](#) | [Completed \(0\)](#)

Thursday, August 6, 2015

	Send Follow Up Email Asking about any cool marketing opportunities - Jed Carlson <small>Last spoke on May 5 • Team: Zvi B. last spoke on May 5</small>	Complete Snooze -
	Follow up with Elizabeth Thorp <small>Blogger at The Huffington Post • Past Clients (skeewisArts), Journalists and Bloggers</small> <small>Last spoke on 7/14/13</small>	Follow Up Snooze -
	Follow up with Ron Schmelzer <small>Ring Leader at TechBreakfast • DC Entrepreneur Stars, DC Tech, Local Legends</small> <small>Last spoke on Feb 12 • Team: Zvi B. last spoke on Feb 12</small>	Follow Up Snooze -
	Follow up with Ben Slavin <small>CEO at Bolster Labs, Inc. • Local Legends, DC Tech</small> <small>Last spoke on Feb 19 • Team: Zvi B. last spoke on Feb 19</small>	Follow Up Snooze -
	Follow up with Mili Mittal <small>Director, Product Management at moral • battledecks 2015 invite, Other Entrepreneurs, Local Legends</small> <small>Last spoke on Mar 6 • Team: Rock D. last spoke on Mar 25</small>	Follow Up Snooze -
	Follow up with Hemang Gadhia <small>CO-FOUNDER & CEO at Hemang • DC Entrepreneur Stars, Local Legends, DC Tech, Kitchen Cabinet, Movers and Shakers</small> <small>Last spoke on Apr 8 • Team: Zvi B. last spoke on Apr 8</small>	Follow Up Snooze -
	Follow up with Mike Leurdijk <small>Vice President at Core Capital Partners • Investor - Series A Lead</small> <small>Last spoke on Apr 13 • Team: Zvi B. last spoke on Apr 13</small>	Follow Up Snooze -
	Follow up with Jayson Gaignard <small>Host at The Early To Rise Podcast • Key Influencers, Movers and Shakers</small> <small>Last spoke on Jun 16 • Team: Zvi B. last spoke on Jun 16</small>	Follow Up Snooze -
	Follow up with Dave Baggett <small>Trustee, Foundation Board of Trustees at Baggett.org • Key Advisors + Mentors, Movers and Shakers</small> <small>Last spoke on Apr 9 • Team: Zvi B. last spoke on Apr 9</small>	Follow Up Snooze -

RPA

View History



B
2.74 RPA

Recent Contacts

Put your recent contacts in a bucket, or skip to ignore them.

Stuart Miller
 [Skip](#)

Rachael Dror
 [Skip](#)

Emy Jackson
 [Skip](#)

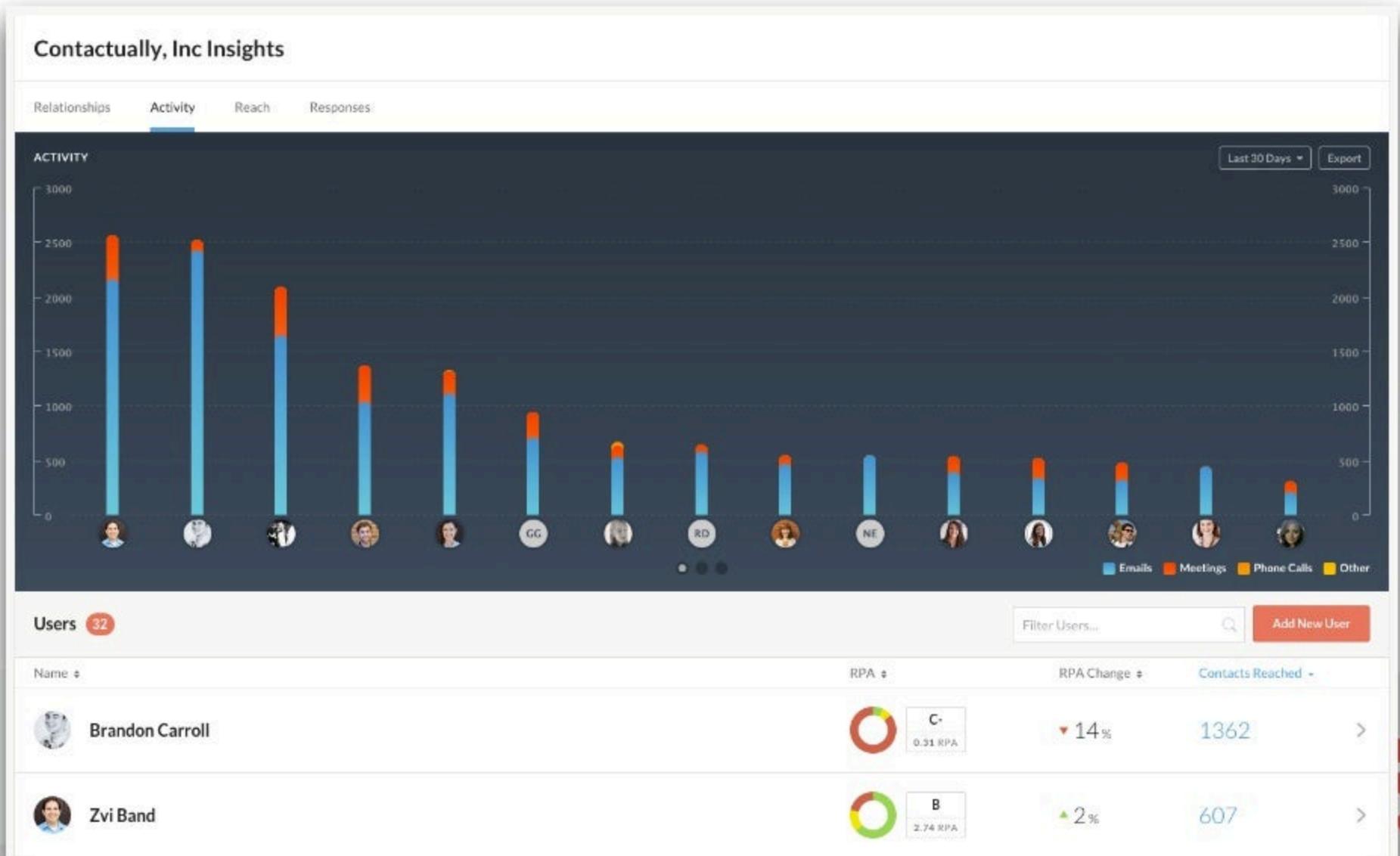
Dan McSwain
 [Skip](#)

Daniel Manson
 [Skip](#)

Recent Activity

- Jeffrey Horn responded to your message.
- Jeffrey Horn responded to your message.
- Carson Alexander opened your message.
- Adam Wassenaar opened your message.

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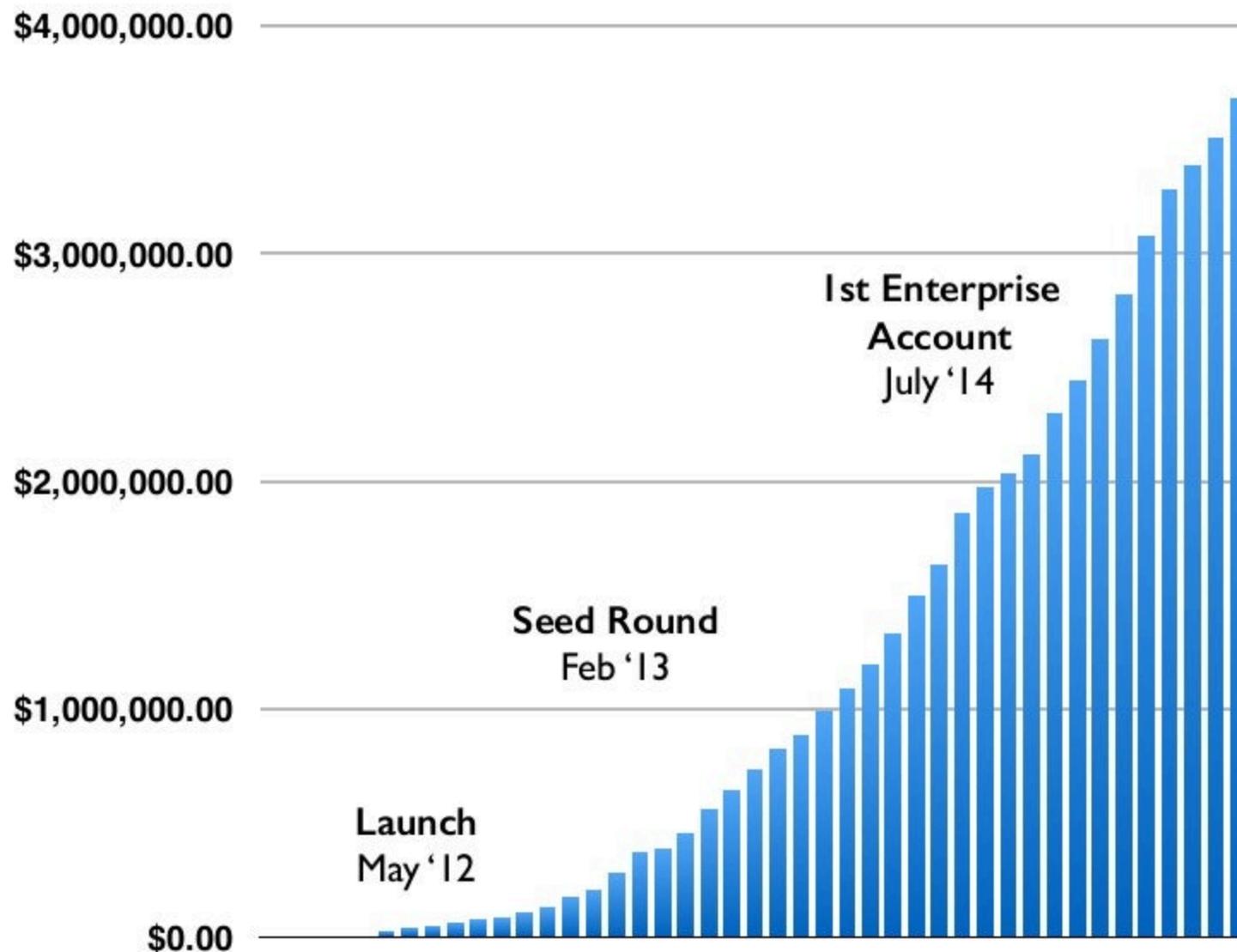
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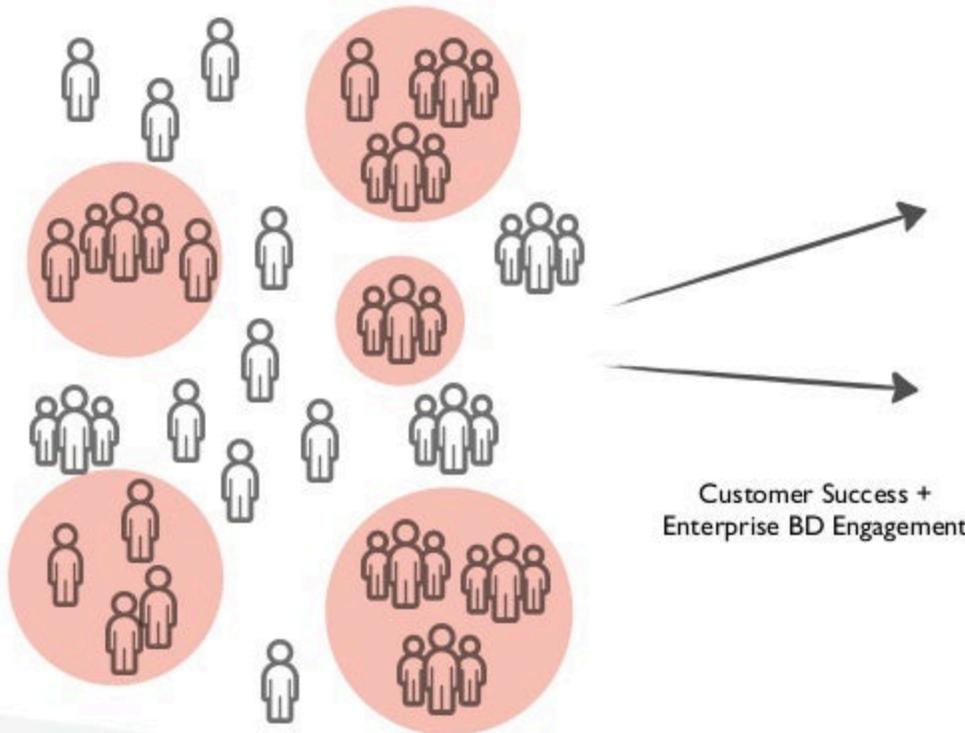
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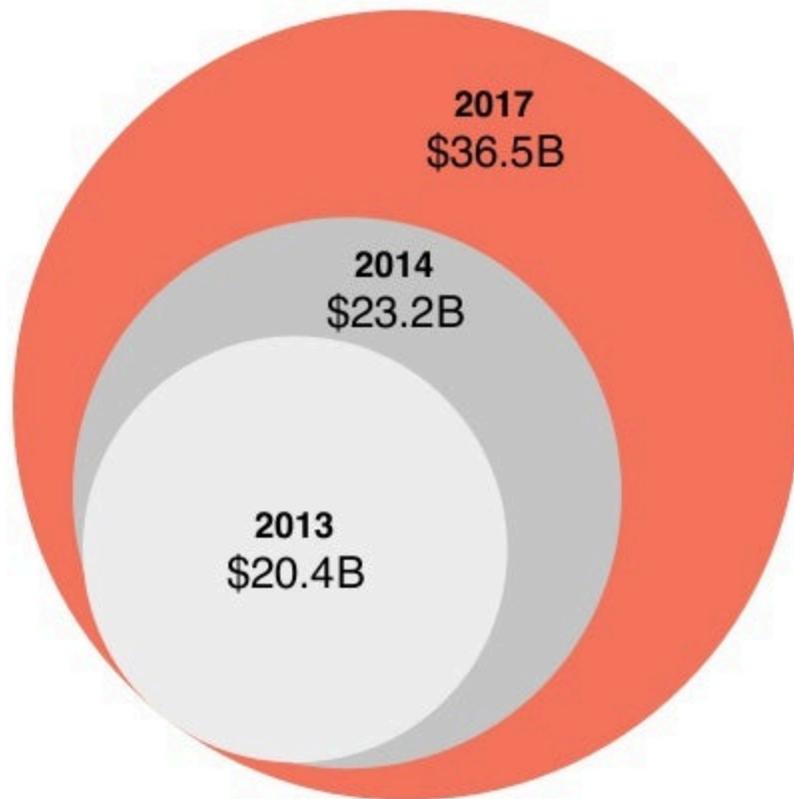
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Founding Team

Investors and Advisors



Zvi Band
CEO



Tony Cappaert
COO



Jeff Carbonella
CTO



Patrick Ewers
MindMavin



Ben Foster
SVP Product, \$OPOWER



Gil Penchina
SaaS Syndicate



Christoph Janz
Point Nine Capital



George Fischer
VP Global Sales, Verizon



Dr. H. Eslambolchi
CTO, AT&T



Add'l: 500 Startups, Boston Seed, Middleland Cap., Middlebridge Cap., 1776 Ventures, Dave Morin (Slow Ventures), Sean Glass (NYSE:ONE), Jawed Karim (YouTube), Jonathan Abrams (Nuzzle), David Steinberg (SwapDrive)

