InfoTrust

INFLUENCING THE FUTURE OF ANALYTICS

The entire Earth is coming online. Eight **billion** new customers are becoming connected and providing a mega-surge to the global economy. Enterprises are racing to connect and engage with this new audience. As the world's foremost analytics technology company, our mission is to lead the way in helping these organizations build systems and processes to measure, understand and impact their online audiences – anywhere in the world. The universal shift is on, and we are capitalizing on it – big time.

The Vivid Vision is a look at where we want InfoTrust to be three years from now. It is an important exercise for a variety of reasons. First and foremost, by defining the future, we can set the path to get there. Plus, it is an excellent way to get everyone on the same page and excited about what the future holds, and an important tool to align our team, partners and investors. Everyone wants to be part of an enterprise on the move. This Vivid Vision is a key step in charting the growth of our company.

Michael L. Alex Y.

THE COMPANY

Still Growing Strong

STRATEGY

With revenues increasing substantially year over year, we continue to operate and grow our business on the non-negotiable principles that got us here:

- We only go after organizations that are strategic to us and can provide recurring revenue and multi-year relationships.
- We structure our operations such that we pay our bills with recurring revenue.

Our Growth does not come from overworking team members. It comes by increasing our per employee profitability through the following strategies:

- Creating more high value managed services around InfoTrust product and service solutions.
- While mindful of client budgets, WE DO NOT COMPETE ON PRICE. Our consultants are top industry experts. We invest heavily in their skills and training to ensure they add more value to our clients than anybody else.
- Adhering to our cornerstones of Innovation and Marketing
- We innovate like crazy. We find the best ways to do things, the faster ways. We figure out where our clients need to be and add value by getting them there.
- We make our brand synonymous with expertise in analytics and tag governance, making us the best choice for clients in need.
- We innovate our People Systems constantly so we can market InfoTrust as the best place to work in the industry. We attract the best of the best in the world of analytics with the greatest opportunity for professional growth and flexibility.

On the strength of our financial stability and significant growth, we are currently working toward the implementation of an Employee Stock Ownership Program (ESOP).

This will transition significant ownership in the company from the founders to the team members. It will give them a personal stake in the growth and success of the company, and a chance for considerable financial gain.

We are fanatical about finding opportunities to improve and optimize how we do things to drive productivity and turn our customers into raving fans. In addition to significantly growing our consulting business, we continue to heavily invest in product development. We have a fast growing product division that provides technologies that can be sold standalone or as an additional offering through our Consulting Services. Today over 30% of Consulting Services revenue comes from offering ongoing managed services around InfoTrust products.

FINANCE

With business processes designed to profitably grow and minimize risk, while maximizing the upside, our profit margin consistently stays **above 10%**. We have 6 months of operating expenses in the bank as cash reserves with no line of credit balance. We practice open book management and constantly review our finances with all members of our team to make sure that everyone knows how his or her work can drive financial results of the company and, therefore, profitability. For example, two factors that can be significant drivers for the value and can be controlled by almost everybody are:

- Increasing company profitability by:
  - controlling expenses
  - identifying opportunities for high margin upsells
  - driving revenue per employee through automation and doing things faster
- Reducing risk by:
  - Paying down of all debt and strong cash flow
  - Reducing customer churn therefore increasing customer's long term value
  - Making sure that we do not have any one of our clients contribute more than 10% of our revenue

THE PEOPLE

We've built the world's leading analytics technology company by building one of the best places in the world to work, and attracting the best people in the world to work here – people who share our values. People with a passion for taking care of clients and solving their problems.

MANAGEMENT

DATA – THE NEW MANAGEMENT PARADIGM

The Method

- Put the right people in the right places and ensure they are well-trained
- Ensure they all know the direction of the company
- Share ALL numbers
- Implement standard operating procedures for all occasions

The Result

There is very little need for actual management. Data is what manages the performance and people are trained to look at the results and course-correct.

Our management team is focussed on process improvement and passionate about helping people. We have documented our key processes - both internal and for our clients – and we are able to execute these processes consistently and without drama. Process improvement is in our DNA and we update our processes every time we come up with a better way of doing something.

Processes and standard operating procedures do not limit our creativity - for us SOP is the way to ensure incredible added value for our clients and to remove risk and uncertainty so we can focus our talents on the areas that add the most value and really push the boundaries of our creativity and expertise.

OUR TEAM

THE BEST PEOPLE IN THE BEST PLACE

We help our team members maximize their potential – in work and in life. We have employees working around the world from our offices and from home. By implementing initiatives like flexible job hours and job sharing/part-time opportunities for busy parents, we are able to hire and retain the best of the best in the world of analytics. We know what they want and give them unsurpassed opportunities to advance their careers and personal brands. With leadership opportunities in every division, every team member has the ability to pursue advancing roles. And we offer the best compensation and benefits in the industry:

- Competitive salary and bonus plan
- Health Insurance
- 401K contribution
- Tuition reimbursement
- Open Paid Time Off (PTO)
- PTO to volunteer
- Maternity and paternity benefits

CORE VALUES

- Diversity – Be empathetic. Seek feedback.
- Respect – Respect your team. Don't be an asshole.
- Innovation – Explore: Share and drive change.
- Ownership – Humbly confident. Crave data. Avoid gut feel.
- Impact – When in doubt, take initiative.
- Growth – Always add value. Be great at something.

THE PEOPLE

THE ZONE

InfoTrust offices have won awards as the best places to work for design, atmosphere and employee engagement. All glass, dazzling colors, bright artwork, dashboards everywhere and boards full of data. We've taken down the walls, replaced offices with open spaces for collaboration and camaraderie but retained plenty of conference space for when it's time to get down to it. Team members brag about their workplace to family and friends, and clients look for excuses to visit. These offices are a big reason why Inc. Magazine, Fortune and Mashable rave about our culture and call us one of the best places to work in the country.

EXPANDING TO SERVE A SHRINKING WORLD

InfoTrust is well-positioned to add value to clients around the world with major hubs in Cincinnati and Dubai, and branch offices strategically located at points around the globe.

ENSURING A LEGACY TO BE PROUD OF

We work hard to make the communities we work in better places. We use our talents and expertise to provide real value to the causes that we feel so passionate about and that reflect our core values as an organization. We do this by donating InfoTrust-owned products to non-profit organizations, promoting and supporting a culture of caring and helping team members give back, providing employee-managed grants to organizations and giving employees paid time off to volunteer for causes close to their hearts.

A CULTURE OF CONSTANT LEARNING

We have self-managed study groups for people working towards professional certifications in things like PMP, AdWords, Analytics, etc. We have created the best place to learn everything about building web analytics systems, and we invest in top tier training systems and processes to keep our team members' skills on the cutting edge.

"AWARDS"

We continue to be recognized as the best place to work, with the best employees.

- Fortune Magazine 100 Best Companies
- Ad Age Best Places to Work
- Cincinnati Best Places to Work
- Ad Age Women to Watch
- DAA Awards for Excellence
- Fortune Magazine Top 40 Under 40

THE PROCESS

SPREADING THE WORD WORLDWIDE – SALES & MARKETING

THE RIGHT MESSAGE PROPERLY DELIVERED – THE MARKETING MIX

Effective marketing is about the proper combination of all marketing activities perfectly executed at the right time. The InfoTrust marketing mix includes:

- Analytics Research Institute - Think tank for using analytics research, know-how and thought leadership as a marketing tool to promote both our products and services
- Content creation and distribution. Blog posts, webinars, industry guides and e-books to help organizations understand rapid changes in digital analytics.
- Search and social marketing
- Event marketing - showcasing InfoTrust products at the premier marketing and analytics conferences, summits and events. Sponsoring various events around the world to continue building our international presence.
- Conferences – InfoTrust-hosted Analytics That Excite has turned from a regional Cincinnati event to one of the premier conferences in the world of analytics. Alongside eMetrics and Programmatic/IO, it's a must attend event for marketers.

RINGING THE REGISTER – SALES

As marketing focuses on growing and nurturing leads, the InfoTrust Sales Team is aggressively focused on identifying best leads and growing them into long-term accounts and partners.The key to our sales strategy is predictability – the ability to forecast and predict the amount of leads and clients that we can sign based on our marketing activities.

SPEAKING WITH AUTHORITY – BRAND BUILDING THROUGH RECOGNIZED EXPERTISE

Recognized experts in the field, InfoTrust employees are regularly invited to be keynote speakers at international conferences on digital marketing, analytics and innovation. Globally recognized as authorities on predicting and actualizing the future of digital analytics, we are often asked to share our research, present our POV and instruct on best practice. This recognition leads to InfoTrust and our team members being featured in leading business publications, and our client case studies appearing on Mashable.com, Fortune.com and AdAge. These brand building efforts have helped cement our position as the world's leading analytics technology company.

THERE'S NOTHING BETTER THAN AN EDUCATED CLIENT!

To add more value to our clients and to make them better buyers or our services, we offer strategic training - every quarter we provide a training session compliments of InfoTrust to their team. Our insights get them excited about the future and gives them confidence in our abilities to get them there.

THE BEST AND GETTING BETTER

NUMBERS TELL THE TALE

90% of our customer satisfaction forms get submitted and constantly rank us as top vendors to work with. For 50% of our largest clients that have such an award we won Vendor of the Year.

THE CRUX OF IT ALL – CUSTOMER SUCCESS

It starts with finding the right customers for us. We have no problem saying no, even to large opportunities, if we feel that they might jeopardize our values or our culture. Those who we do work with appreciate not only our skills and expertise, but also the 100% transparency in everything we do. We are not order takers doing only what the customers ask - we are trusted partners who proactively manage each account and push them to not only maximize their investment in analytics, but also their ability to use the data to drive their business. We visit each client quarterly and regularly invite them to our offices to get in the 'zone'.

GETTING THERE TOGETHER

Most likely, the question on your mind is "How?" Asking "How?" keeps us safe. We want a plan, a series of steps to address our uncertainties. We want assurance that this is not going to be uncomfortable. When we ask "How?", we want others to tell us, "This way." This is not a manual. The answers to "How?" are what we will design together over the next three years.

The real question surrounds our commitment to each other - the commitment to act on what matters and enter the uncharted territories of opportunity. We live toward the future that we imagine, and the task is to keep focused on that vision and let that be the context for all our actions every day!

To Our Continuous Success,
Michael L and Alex Y

This is InfoTrust in 12/31/19. The world's leading analytics technology company. Riding a wave of success. Poised to keep growing into the future.