

The Symbiosis mission is to improve CRM adoption rates for businesses, increase sales volume and frequency, gain customer loyalty and decrease customer service and sales costs by providing **a user-friendly, innovative & powerful CRM system.**



SYMBIOSIS

ONE-PAGE BUSINESS PLAN

CRM, Gamified.

Symbiosis is an innovative, interactive CRM that combines gamification features and social media integration to drive user adoption and customer loyalty.

THE COMPANY
Walnut Creek, CA

Bill Johnson
FOUNDER & CEO

John Bryant
FOUNDER & CTO

Jennifer Thomas
CMO

Michael Russman
CFO

THE PRODUCT

- ★ Tarantula gamification tools to increase user adoption
- ★ Loyalty program application to engage customers and referral partners
- ★ Social media, email, phone and mobile app integration
- ★ Customizable actions, rewards, levels and badges makes the platform applicable to any industry
- ★ State-of-the-art CRM (contact and activity management, sales funnels, financial analytics, reporting, etc)

MARKETING STRATEGY



DISTRIBUTION CHANNELS

- WEBSITE STORE
- SALES AGENTS
- PARTNERING RESELLERS

FINANCIAL SUMMARY

	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
Online Sales	200,000	1,025,000	3,181,250	9,914,063	20,928,125
Direct Sales	31,126	434,918	2,097,088	4,676,226	8,397,830
Partner Sales	22,500	223,219	712,443	1,678,817	3,014,913
TOTAL SALES	253,626	3,433,138	9,203,156	22,432,941	44,793,857
COGS	175,615	1,856,279	4,436,261	10,372,696	20,008,118
OPEX	323,658	1,556,723	3,823,396	9,280,557	13,505,902
PROFIT	(\$246,880)	(\$175,601)	\$508,910	\$1,565,064	\$9,306,740

ACHEIVEMENTS TO-DATE

- Incorporated the Company
- Assembled key management team
- Acquired technology patents and copyrights
- Acquired \$50K in start-up capital

We Need \$600,000
in seed funding

- \$150K completing the alpha CRM technology platform
- \$73K startup expenses (furniture, improvements & organizational expenses)
- \$477K operating expenses such as sales, marketing and personnel expenses

to reach the projected YEAR 1 MILESTONES

- Develop, launch and test beta platform followed by official launch
- Obtain market validation with 12,000 monthly website visitors, over 2,500 active seats and over 24 reseller accounts
- Build full team of personnel including lead engineers, sales and customer services representatives and sales and marketing managers

EXIT The most likely exit for Symbiosis will come from an acquisition by a major player or such as Salesforce, Oracle and Dynamics CRM once the Company reaches 500,000+ company clients.



UTILIZING CLOUD-BASED TECHNOLOGY

- Easy to use
- Competitive price
- Diligent customer service
- Connection generator
- Tarantula gamification platform
- Effective loyalty program
- Free trial and effective upsell strategy
- Experienced management team

THE MARKET

Small businesses in the US and their wage and salary workers in the fields of:

27.9 million small businesses
13+ million wage and salary sales workers

THE COMPETITION

THE INDUSTRY

CRM INDUSTRY
North America is currently the largest CRM market, reaching **\$10billion** in sales for 2012.

SAAS INDUSTRY
\$22.1 billion in sales by 2015.