



RELATIONSHIP SECURE



Reviewer's Guide

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RelationshipSecure Reviewer's Guide

1. Introduction

Thanks for your interest in the RelationshipSecure software. Our product was designed from the ground up to solve one problem: **maintaining professional relationships with a large number of people.**

The founder of the company, Scott Brown, has an extensive background in the recruiting business. Our experience coaching and providing placement services to executives and other high level professionals led us to the conclusion that networking with other people is the best way to move ahead in ones' career. We also found that the average executive has over 1,000 contacts in their address book and many have several thousand.

Networking expert Harvey MacKay, author of "How to Swim with the Sharks without getting Eaten Alive," is famous for recommending people come up with an "excuse" to stay in touch with all their contacts on a regular basis. Of course, when he says "excuses," these are really valid reasons to get in touch with someone: finding out what they've been up to, wishing them a happy birthday or anniversary, and making sure you have each others' latest information. People do all these things in their professional relationships today when they think of it. RelationshipSecure lets you automate these processes. You've probably heard of the term CRM which describes a technology corporations use to maintain relationships with their customers. We like to call our technology "iCRM," or Individual Contact Relationship Management.

Core Mailing Features

The core function of the software is being able to send out various types of mailings to ones' contacts:

- Sending out your latest contact information, which can include a link to a Biographical web page you can have RelationshipSecure create for you. Bio pages can let your contacts know what you've been up to and also can include a photograph, helping contacts you haven't been in touch with for a while match your face with your name.
- Sending out mailings to request your contacts' latest information
- Sending out birthday and anniversary e-greeting cards

Additional Mailing Features

While other contact verification software is limited to e-mail mailings only, RelationshipSecure provides the added benefit of being able to send mailings by fax or postal mail (via mail merge with Microsoft Word). This lets you send mailings to people who you don't have email addresses for or who don't respond to an e-mail mailing.

Reports Let You See What's Happening with your Contacts

Aside from its mailing features, RelationshipSecure provides an extensive contact reporting capability. These reports let you find out what's happening with your contacts and give you tools to follow up as appropriate. Reports RelationshipSecure can generate include:

- Showing contacts you haven't heard from by e-mail for a while. Lets you send a mailing to these people either inquiring about what they're up to and/or letting them know what you've been doing.
- Showing contact records with missing information – like missing phone numbers, fax numbers, contacts without a mailing address, etc. This helps you clean up your address book and gives you the ability to send out mailings to these people asking for the missing information.
- Providing a list of people you've received emails from but who aren't yet in your Outlook contact list. Gives you the ability to add any or all of these people to your Outlook contacts automatically.

Automatic Response to Verification Requests

Another benefit to using the software is it can automatically respond to any requests for updated contact information sent by other users of RelationshipSecure. It can also respond to requests sent by users of other contact verification software like GoodContacts and Plaxo. The first time a request comes in, you can tell RelationshipSecure how you want to respond: which of your personal business cards to use and whether to provide personal information or just professional info. You can also specify you don't want to respond to the person's requests automatically in the future.

2. The RelationshipSecure Difference

While there are other contact verification programs, RelationshipSecure is the only one that is Relationship-centric rather than Contact-centric. Here are some examples of ways the software puts relationship-building at the forefront:

- The ability to have multiple personal business cards. Users of RelationshipSecure have the ability to enter multiple profiles for themselves: both professional profiles and personal profiles. You may want to provide a certain set of contact information to some people and other contact information to different people. For example, you may be the president of your son's PTA and treasurer of your college's local alumni association. You can enter different profiles for each of these roles, and can also have RelationshipSecure create a Biographical web page for each profile. The bio page for each profile may emphasize different aspects of your background and could highlight recent accomplishments pertinent to each one. You could include a photo from a recent family vacation at Disney World in your personal profile, and a photo from a recent Alumni reunion in your profile for your role with your alumni association.
- Ability to send out mailings to different groups of contacts. RelationshipSecure can take advantage of Outlook's category functionality. You can specify in Outlook that a contact is a member of certain categories, like "PTA" and "Co-Worker." You can then send mailings to these groups with the appropriate profiles attached and can custom-tailor the text of the emails sent out so they're appropriate to the group.
- Networking expert Harvey MacKay came up with what he called the "MacKay 66" – a list of questions to ask contacts that can help build closer professional relationships with them. These include questions like spouse's and childrens' names, favorite sports teams, and birthday and anniversary dates. Microsoft Outlook actually does a great job of providing fields for this sort of information under the "Details" tab of contact records. But putting that information to use has been a different story up until now. RelationshipSecure gives you the ability to send out birthday and anniversary e-greetings automatically.
- E-mail is a great tool for maintaining relationships with a large number of people. But considering the number of emails busy people receive, it's often hard to keep track of people you have and haven't heard from recently. This is especially true with people who have lots of contacts. RelationshipSecure provides a report that lists contacts you haven't heard from for a while (you can specify how long ago "a while" is). It gives you the ability to send mailings to these people so you can keep up with them.

3. Using the RelationshipSecure software

RelationshipSecure was designed to be very easy to use. It is activated when Outlook starts and runs quietly in the background. Several buttons are added to the toolbar at the top of the Outlook window which can be used to activate various RelationshipSecure functions, which are described later in this section.

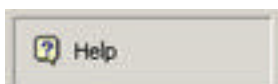
When RelationshipSecure starts up, a splash page appears on the screen. You'll notice there's a checkbox that can be clicked at the bottom of it if you don't want it to show in the future while RelationshipSecure is loading. How quickly RelationshipSecure starts up is largely a function of how many folders and how many contacts you have in Outlook. Also, if you're using any "remote" or virtual folders, such as Hotmail email access through Outlook, this can cause the loading process to take a little longer. On average it takes 20-30 seconds for the program to start up.

Installing the Software

RelationshipSecure can be installed much like any other Windows software. Users can download a setup file from our web site, which is called "Rssetup.exe." After clicking "Download" from our home page at www.relationshipsecure.com, a link to download the setup file is provided. When you click on the link, your web browser will ask you if you want to Open the file from its current location or save it to disk. Either is fine. When saving to disk, you will have an extra step of having to double-click the icon for the file to open it after it downloads.

When the installation program begins, you can just accept the default setting for all the prompts that come up. At the end of the installation process, you will be given an option to launch the program. This will cause Microsoft Outlook to load.

The first time Outlook loads after RelationshipSecure is installed, you will be given an opportunity to configure your settings for RelationshipSecure. This includes providing your business and home/personal contact information, and confirming the email address you're using. The setup process is fairly self-explanatory. However, if you have any questions while going through the setup, just click the Help button at the bottom of the screen which looks like this:



Sending a Mailing to Verify Contacts

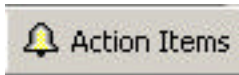
When you're ready to send out a mailing to verify your contacts, click the "Verify Contacts" button which can be found in the toolbar at the top of the Outlook screen. The button looks like this:



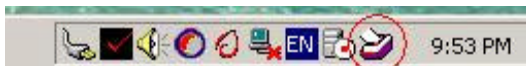
Once you click that button, a wizard will appear to take you through the process of sending out a mailing. If you have questions at any point, you can click the "Help" button at the bottom of the screen.

Receiving Updated Contact Information after Sending a Mailing

After you send out a mailing to your contacts, you'll start getting responses from people who have updated their contact information. If a contact simply confirms the information you had on file for them as being correct, you won't have to take any further action: a note will be made in their Outlook contact record indicating the information was confirmed. However, if the contact makes any changes to the information you had for them, it will come back to your Outlook and go into your Action Items. To see your current action items, click the "Action Items" button on the top of the screen in Outlook, which looks like the following:



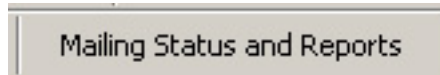
When you have Action Items that haven't been dealt with yet, RelationshipSecure places a flagged mailbox icon in your Windows system tray. This way, you can see you have action items even if you have Outlook minimized at the time. The following image shows the action items icon circled.



If you put your mouse cursor over the Action Items icon, a caption will appear indicating how many action items are pending. If you double-click on the icon, it will display the Action Items screen.

Finding Out the Status of Mailings

If you want to check the status of a mailing you've created to find out who's received the messages and who's responded, etc., you can click the "Mailing Status and Reports" button in the main Outlook window. The button looks like this:



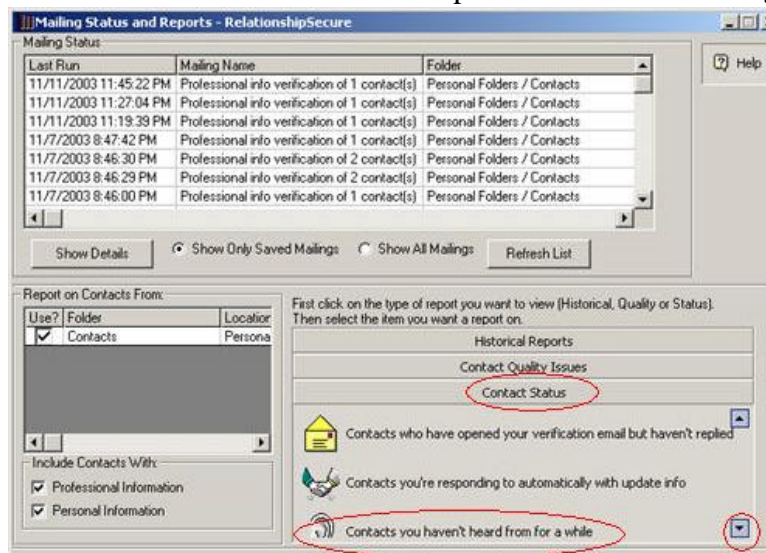
The top of the screen that appears next includes a list of all the mailings you've created. You can highlight the mailing in the grid that you're interested in and then click the "Show Details" button to bring up a screen showing further information about it. You can click the "Help" button at the top right of the screen if you have any questions.

Viewing Reports

Clicking the "Mailing Status and Reports" button described above shows both mailing status and reporting options. The top half of the screen lists mailings you've created, and the bottom half of the screen shows reports you can generate.

Finding Contacts You Haven't Heard From for a While

One of the reports you can generate shows contacts you haven't heard from for a while. This report lets you define how long ago the last contact would have to be for the person to be included in the report. It also lets you send follow-up emails to some or all of the people included. To get to the report, first click the "Mailing Status and Reports" button as described above. On the bottom half of the screen that comes up, you'll see a list of reports, divided into three sections. The third section, "Contact Status," contains the report showing contacts you haven't heard from. Click on the "Contact Status" heading to show the associated reports. Then click on the down arrow in the list of reports that comes up until you see the "Contacts you haven't heard from in a while" option. Click on that option to display the report. The screen shot below illustrates the above steps and has the three things to click on circled.

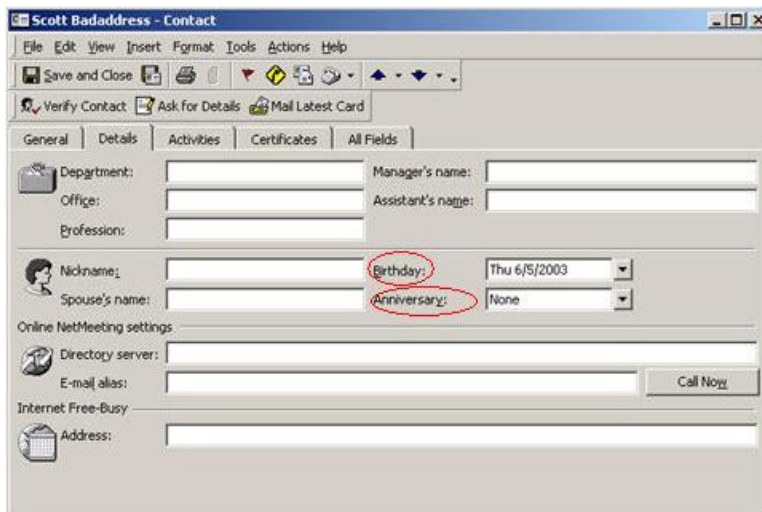


Sending Birthday and Anniversary E-Greetings

You can see contacts who have Birthdays and Anniversaries coming up with the respective reports for each which are also in the “Contact Status” section of the Reports list. See the illustration in the preceding section for instructions on navigating to these reports. They can be found right below the “Contacts you haven’t heard from for a while” report.

Once you have displayed the Birthday or Anniversary report, you’ll have options to schedule e-greetings to be sent right away or on the day of the event. For any items to appear in these reports, you will need to have specified birthdays and anniversaries for some of your contacts in Outlook.

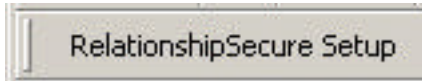
To enter birthdays and anniversaries, bring up a contact record screen in Outlook. Then click on the "Details" tab. The Contact screen should look like this:



The screenshot shows the Outlook 'Details' tab for a contact named Scott Badaddress. The interface includes a menu bar (File, Edit, View, Insert, Format, Tools, Actions, Help) and a toolbar with icons for Save and Close, Verify Contact, Ask for Details, and Mail Latest Card. The 'Details' tab is selected, showing fields for Department, Office, Profession, Manager's name, Assistant's name, Nickname, Spouse's name, Birthday, and Anniversary. The 'Birthday' field is set to 'Thu 6/5/2003' and the 'Anniversary' field is set to 'None'. Both the 'Birthday' and 'Anniversary' labels are circled in red. Below these fields are sections for Online NetMeeting settings (Directory server, E-mail alias, Call Now) and Internet Free-Busy (Address).

Changing Configuration/Setup Options

If you want to make changes to your setup options for RelationshipSecure, just click the “RelationshipSecure Setup” button from the main Outlook window. It looks like this:



In RelationshipSecure Setup, you'll be able to change your personal business card profiles, modify your email setup including the email address you receive messages at with Outlook, as well as change advanced options like file locations. Click the “Help” button at the bottom of the setup screen if you have any questions.

4. If You Need Help

The “Support” section of the RelationshipSecure website at relationshipsecure.com includes a list of Frequently Asked Questions (FAQ) along with their corresponding solutions. Feel free to check the FAQ to get an immediate answer to your question.

You can also email us for help at support@relationshipsecure.com

Thanks for your interest in our software and please do not hesitate to contact us if we can provide any other assistance.