



**CHANNELPACE**  
**Business Contact Management, Reinvented™**  
For Individuals, Teams, or Whole Companies

Cloud-based Business Contact & Relationship Management system where the contacts are owned by the individual users, harnessed by everyone in the same company, and updated by anyone in the world connected to the same contacts.

Your contacts are always yours, even when you move to another job.

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# Introduction

## The problems we set out to solve

The contacts we make during our working life are one of our most valuable assets, and at its core, ChannelPace is designed to enable you to get them organised, in one place, and available across all your web-capable devices.

With the advent of mobile computers, tablets and smartphones, just keeping contacts up to date across all devices is problematic and sometimes painful. The rise of business networking sites such as LinkedIn seemed to be a solution, but most people only have the bare minimum of information in their profile, and over time, the information isn't updated, to the point of being less than useful.

CRM in the office is becoming more problematic, and less relevant. Sometimes the information is there, sometimes it isn't, and even if it is accurate (rarely) it isn't available on other devices, or it is excruciatingly painful just to get an email distribution list organised.

Traditional CRM is based on the "company" owning the contacts. The ChannelPace premise is that individuals own contacts, and our system enables sharing between users at the same company, thereby harnessing the knowledge of co-workers. When a ChannelPace user moves to another company, they take their contacts, and an imprint is left behind.

## What makes ChannelPace different?

ChannelPace is the world's first crowd-sourced contact management system for the business-to-business world, where full business card details are captured.

It's a cloud-based system where the contacts are owned by the individual users, harnessed by everyone in the same company, and updated by anyone in the world connected to the same contacts.

Contacts may be entered in the same manner as a traditional CRM system, or via business networking, in a manner similar to LinkedIn.

Only one record is ever kept of a business card, keyed on the unique email address, and then people with the same contacts or in the same company, participate in the updating of the information without possibly being connected or aware of each other.

It aims to make individuals and companies more efficient, more effective, and to give them a competitive advantage.

And, you never have to remember a password.

# What is ChannelPace?

Cloud-based Business Contact & Relationship Management system where the contacts are owned by the individual users, harnessed by everyone in the same company, and updated by anyone in the world connected to the same contacts.

## Business Contact Management



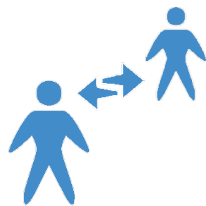
At its core, ChannelPace is a place to store all your business contacts.

Any contacts you enter into the system are added to your MyContacts list. Your MyContacts list can be exported in VCF or CSV format.

When you move to another company, your contacts move with you also.

All users connected to the same contacts participate in information updating so that the latest information is always available. You don't need to wait for a contact to join; you can add contacts to the system yourself.

## Business Networking

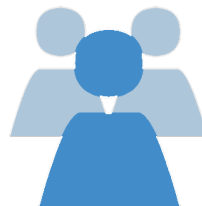


Similar to other networking sites like LinkedIn, Facebook and others, you are able to exchange details with other ChannelPace users; we call this "Associating". Any contacts you associate with are added to your MyContacts list.

Because the ChannelPace system forces entry of full business contact details, when you associate with another user in the system, you are exchanging full business card details.

Confidence in people being at the company they say they are work at is able to be maintained by our authentication system, and by the crowd-editing of information.

## Business Relationship Management



BRM goes beyond CRM (Customer Relationship Management) as aside from customers, it also understands suppliers, competitors, channel partners, distributors and other business relationships. It understands that not all contacts are customers.

By harnessing shared information, when you search for a contact that is known by someone in your company, you are able to view the full contact details, just like regular CRM.

Task Management, recording of interactions (phone calls, meetings, emails etc), Account ownership and more is also available.

## Social Communication



Social can mean a lot of things, but in the ChannelPace system it means being able to interact with people you know, reach out to those you don't, and the ability to send targeted messages to certain demographics.

One to One messaging is available through our PaceMail system.

Instant Messaging and file sharing is available to contacts in your MyContacts list.

PaceWire, our one to many messaging system enables you to reach people in the system that you don't know in an unobtrusive way.

# Features & Benefits

There are many features in the ChannelPace system designed to make you more efficient, more effective, and to give you a competitive advantage. Here are some of the core ones ...



## Contacts

Keep your contacts organised and within reach. When you change jobs, they move with you.

You can export them at anytime and from your smartphone, make phone calls, send email, SMS and record interactions.



## Shadow Contacts

Add contacts, even if they haven't joined Channelpace, just like traditional CRM.

When you enter a contact already known by the system, you are now crowd-sourcing the information with anyone else with the same contact. This is where real magic happens.



## PaceShare

Share the details of one of your contacts with another of your contacts, or anyone in your company.

This sets up a two-way association between the contact you are sharing, and the user being shared with.



## Tasks

Assign tasks to yourself so that nothing is forgotten.

You can even assign tasks to other users in your company. Our system will remind you when something is falling due.



## Companies

Find the right company address details, Industry Channel classifications and more.

ChannelPace understands customers, suppliers, distributors, resellers and even competitors. Define relationships between companies.



## Business Networking

Connect with other users in the system to exchange full business card information.

Have confidence when you connect with other users and get full business details.

Only people in business are in ChannelPace.



## Email Distribution Lists

Put together an email distribution list at your accounts based on the contact knowledge of everyone in your company.

Select by job function, company, or a combination of these. Created in seconds.



## My Accounts

The accounts you look after can be viewed by you, your company and customers can find you.

Generate email distribution lists based on the contact knowledge of everyone in your company.

# Features & Benefits Continued

There are many features in the ChannelPace system designed to make you more efficient, more effective, and to give you a competitive advantage. Here are some of the core ones (continued)



## Insight

Giving you contextual information about companies and contacts.

See who your contacts are connecting to in the system, find out who is new in your customers.



## Chat

Instant messaging with your online contacts, and even send files to each other.

Instant messaging is a great timesaver and allows you to quickly check something with a contact.



## Interact

Keep track of phone calls, meetings and other events, or just write a note.

You can make the information available to anyone in your company or keep it private.



## Pinned Contacts & Companies

Always within easy reach, you can pin and unpin your favorite contacts and companies.

Always accessible on your screen, your pinned contacts, companies and accounts are always just one click away.



## PaceMail

One to one messaging with some extra features.

PaceMails are deleted (fully) when both parties delete it, or when 60 days expires, whichever occurs first.



## PaceWire

Get your message out, even to those you don't know yet. Select by demographic.

PaceWires allow you to send information where you select and control who can see the information.



## PaceAssist

First Knowledge Advantage™  
Your Channelpace concierge will update you on contact and company changes and issue you VIP contact reminders.

Rather than a waterfall of information you are not interested in, PaceAssist allows you to target which companies and contacts you want to keep abreast of.



## Confidence

Have trust in who you are dealing with. The system assigns a rating to all users indicating likelihood they are still at their company.

Users are able to participate in the updating of contact information, even for shared contacts that have never logged in ensuring information is fresh and up to date.

## What does it cost?

Similar to LinkedIn, Facebook and other social systems, it's free to join ChannelPace. Once you have registered, you can choose to upgrade to our premium plan for additional features.



### **WALKER** **\$AU 0.00 per month**

Our walker plan enables you to get organised for free.

No credit card is required to register so you have nothing to lose. Start Now and get organised.

Our Free features include:

- Contact Management
- Business Networking
- Crowd-sourced updating
- SmartPhone App (iOS & Android)
- Export Contacts at anytime
- Instant Messaging
- Search / 50 Results
- PaceMails to Contacts



### **SPRINTER** **\$AU 19.79 per month, or** **\$AU 149.79 per year**

For sales and marketing professionals who want to stay on top.

Access all features including PaceAssist with First Knowledge Advantage™ Alerts and our Social Messaging platform, PaceWire.

Walker plan features, plus:

- Shared Contacts in Company
- First Knowledge Advantage™ Alerts
- Task Management
- Account/Territory Management
- Accounts List Email Generator
- Record & View Your Interactions
- View all Interactions by your company
- Accounts Visibility by Customers
- PaceWire Social Messaging Access
- Search / 200 Results
- 5 PaceMails/Month to non-contacts
- Access to Referral Program

# How is ChannelPace Different to Traditional CRM?

- *Contacts are owned by the individual users*
- *Individual users' contacts are pooled with other ChannelPace users in the same company*
- *Access and validation controlled by the company (via email address access)*
- *Globally crowd-sourced updating of information*
- *Understands Customers, Suppliers, Distributors, Competitors & more*

Traditional CRM and ChannelPace differ at a very basic level. CRM is built on the premise that the company owns the contacts; ChannelPace is built from the ground up recognizing that the individuals own their contacts. This is a very basic, but extremely important point of difference.

The first pillar of the ChannelPace system, contact management, provides people with a place to enter their business contacts. As the only way into the system is via a work-issued email address, we bring users from the same company together by creating a dynamic CRM system where everyone in the same company's contacts are pooled. Individuals still "own" their contacts, but now everyone in the same company has access to the contact knowledge of all other ChannelPace users in their company. When you leave your company, you lose access to the shared knowledge. When you start at a new company, your contacts are now pooled with other ChannelPace users at your new company.

In this way, we are providing a contact management system where users have an active interest in using it, as it is their information. We then provide account ownership, task management, recording of interactions (such as meeting notes, important phone calls etc), to deliver a CRM system that is secure, but outside the company.

Traditional CRM relies on users within the company keeping information updated. ChannelPace does this also, but extends the updating reach to any other users around the world with access to the same contacts. We call this crowd sourcing, and it is one of the most powerful features of the ChannelPace system. To illustrate this, when you meet a person and exchange business cards, as a ChannelPace user you enter them into the system as a new contact. This contact is now yours, no matter where you go in your career. Everyone in your company can see this contact's details also (like normal CRM). Another ChannelPace user at another company now meets the same contact and similarly goes to enter the contact in the ChannelPace system. As the system already knows the contact, the user is prompted to validate they know the contact. Once they do, they are now connected to the card of this contact, like the initial person who entered them into the system. Now the information is available to two different companies (invisible to each other) but if anyone updates the information of the contact, everyone now has the new information. We refer to this as crowd-sourcing.

Any people who have validated access to the information, regardless of the company they work for, are able to harness and participate in a globally crowd-sourced system. When a contact logs in to ChannelPace they alone now control the updating of their own information. If they do not come back to the system in 30 days, their information resorts to being crowd-sourced again.

# How is ChannelPace Different to LinkedIn?

- *Full business card details always provided when connecting*
- *Crowd-sourcing of information updates*
- *A higher confidence in accuracy of information*
- *Pooling of contact knowledge by users within the same company*
- *Business details only, nothing personal*
- *Instant Messaging with contacts*

ChannelPace also provides business networking, but differs in a few key areas.

## **Confidence**

One of the most annoying things to me about LinkedIn is that there is no way to have any confidence that when a person says they are at “XYZ Company”, that they actually are. Over the years, I have constantly been amused to see people saying that they work at a particular company, when I know they left six months ago. Because of the way ChannelPace works, once a contact has had no interactions with other users, and has not logged in for more than 30 days, the system reverts to crowd-sourcing of information on that contact. All people associated with that contact, and people in their company, are now able to keep the information updated or even flag the person as having left the company. In this way, the system can provide an indication of the likelihood of a contact still being at the company they say they are at.

## **Full business information**

Have you ever wanted to get in touch with one of your contacts on LinkedIn, only to find a free email address in their profile and no phone number or address? ChannelPace forces the entry of all the information you would typically find on a business card, so when you are viewing a contact, you have all the information you need to contact them.

## **Contextual**

Today, a contact on LinkedIn may be a customer, but when you (or they) move to a different company, that relationship may change. ChannelPace understands the different relationships that can exist between companies and is aware that the context of your contacts is always in a state of flux. Additionally, sub-relationships that are specific to your company can also be defined.

## **Collaboration**

One of the great benefits of ChannelPace is sharing and collaboration by users in the same company. LinkedIn, in effect, encourages walled silos of individual information whereas ChannelPace shares information between users in the same company. If someone in your company knows a contact, then everyone in the company has access to the contact’s full business information. This is where we blur the lines between business networking, contact management and CRM. The visibility rules are the same as with traditional company CRM, mixed with the benefits of LinkedIn’s business-networking and personal contact management.



# A few things to do to get started

Like any new system, it takes a little bit of effort to get underway. We have found that individuals and companies who gain the most out of ChannelPace quickly, do some or all of the following:

- Add some contacts today, and send invitations. Click **AddContact** on the top menu bar.
  - Suppliers
  - Customers
  - Co-workers
  - Other Business Acquaintances, even competitors!
- Use our PaceCapture service to get your contacts into ChannelPace
  - Send physical business cards to ChannelPace for entry
  - Snap a photo of a card and send to ChannelPace
  - Submit a csv/xls file of contacts
  - Capture a contacts' email signature for entry
  - Visit <http://channelpace.com/pacecapture> for more information
- Have several co-workers also use the system
  - As you & co-workers add contacts, you are now creating a CRM system
  - Use Instant Messaging and file sharing
  - Record interactions with contacts by clicking the Interact button
- Get the ChannelPace companion app – visit <http://channelpace.com/mobile>
  - Harness contact knowledge of all ChannelPace users in your company on your phone. Send email, make phone calls, send text messages and more
  - If someone in your company using ChannelPace knows a contact, full contact details are available on your phone.
- Verify your personal email address **IMPORTANT!**
  - Make sure you verify your personal email address by clicking the link in the email sent. This will enable you to transfer your MyContacts list if you ever move to another company. Your personal email address is never displayed and is only used for this purpose.
- Add Companies to your MyAccount list
  - Enter contacts from each of your accounts you are involved with
  - Add the companies (when viewing company card) to your MyAccounts list by clicking the MyAccounts button.
- Get Social!
  - Send a PaceWire (one to many) to your MyContacts list, or even just a subset of your contacts.
  - Click the “Associate” button when viewing a contact you don’t know to exchange business card details
  - Instant Message contacts who are online

By adding several contacts rapidly, and then having ChannelPace open in a tab in your browser all the time, you will quickly start to see the benefits.

# Viewing Information – Contact Card

## Confidence.

The colour of the icon reflects the system's confidence that the contact is at the company. Click Icon for further information.

## ChannelPace User?

If the user icon is solid, they're a ChannelPace user. If it's hollow, they've never logged in and the information is crowdsourced.

## Trusting Information

If a user has never logged in, or hasn't in the past 30 days, contacts get to tell the system if a particular user is still at their company.

## Crowdsourced Edit

If a user has never logged in, or not for the last 30 days, click the Pencil Icon to edit their details.

## Record Interactions

Keep a record of meetings, emails, phone calls and other important information using the Interact button.

## Blue? Click it!

Click on the email address to compose a new email in your email client, click the website URL to open a tab and visit their site. If it's blue, click it to view more information.

## Company Information

Click on the company name to be taken to the Company Card for the contact you are viewing.

## Tabbed Info

Click on the tabs for more information about this contact including interactions by you and other in your company, tasks, pacemails, other company locations and even organizational info.

## Insight

Clicking on Contact Insight can give you a view of a contacts connections in the ChannelPace system by Job Function and even by Industry Channel.

## Quick Export

If a contact is in your MyContacts list, export a VCF card for use by your computer's address book.

**John Smith**  
Demonstration User

appstoreuser@channelpace.com  
channelpace.com

**Channelpace Pty Ltd**  
Level 2  
541 Blackburn Road  
Mount Waverley  
Victoria 3149  
AUSTRALIA

**Mobile** +61555123456  
**Phone** (03) 9988 1860  
**Fax** (03) 9988 1861

Interact Assist  
PaceMail PaceTask  
Pin Block

**About** Interact Tasks PaceMails Locations Staff Peers Accounts

**Job Function:** Information Technology  
**Contact Insight:** John is associated with 8 contacts.

**Reports to:** Greg Furlong  
Chief Executive Officer  
**Internal Phone Extension:** Unkonwn

**My Responsibility:** I am a demonstration account. Feel free to associate with me, but I'm not real ;)  
Export VCF

Industry Channel Job Function

Associations by Industry Channel

Industry Channel	Count
Accommodation, Food Services & Tourism	1
Education & Training	1
Financial Services and Insurance	15
Health & Pharmaceutical	1
Information Technology & Communications	75
Legal Services	1
Marketing, Advertising & Public Relat.	1

## PaceAssist

Place an "Assist" on a contact and anytime information changes, you'll be notified. In addition, the system will remind you to touch base with anyone you haven't spoken to in a while.

## PaceTask

Let the system remember important tasks you need to complete that are related to this contact. Set it, and the system will remind you when it's coming due.

## PaceMail

Send messages through the system to your contacts. Deleted automatically after 60 days, or when sender and receiver both delete.

## Pin It!

Quickly pin a contact for quick access later.

## Click A Phone #

Click on a phone or fax number for it to be displayed in a larger font, ready for you to record notes from a phone call.

## Click to Call

Click the phone icons to automatically dial any configured calling device, ie VOIP phone, Skype etc.

## Locations Tab

Quickly view other locations for the contact's company

## Staff & Peers

If you have staff or a manager in the system, you are also able to view staff and peers of your contacts (if available)

## Accounts

If the user you are viewing is from your company, you can see which accounts they are involved in if they have defined in the MyAccounts section

# Frequently Asked Questions

## **What do you do with all my data?**

We provide a platform for you to manage your business contact information. We do not sell it, lease it, rent it, nor do we claim ownership of it. It's your information, not ours.

## **When I add a contact, do you notify them?**

No. If you add a contact and want them to also use the service, we provide you with an Invitation button. No notification is sent unless you initiate it.

## **Can I see who has viewed me?**

No. We don't track who views whom. You can't see who has viewed you, and others can't see if you have viewed them.

## **Can I export my contacts?**

Yes. You can export your MyContacts list anytime in CSV or VCF format. **Menubar > MyContacts**, then select the export format.

## **Do you track me across the web?**

No. We are not a part of any ad or tracking network. ChannelPace is designed to make your work life more efficient; we have no interest collecting information on what you do on the web. We provide a standalone system that does not feed information out to, or in from, other information sources.

## **Who can see me, and what can they see?**

When you register into ChannelPace, all other users are able to find you, however they can't view the following information: Email address, mobile phone number, or direct phone number. They can view your name and company details, and can send you an association request.

When you Associate, or connect, with another user, your email address, mobile phone number and direct phone number become visible to the contact you connected with and users in their company. This is like a normal CRM system. When you associate with another user, you are giving them your "business card", and now that user and others in their company can view your details. This is the same as one of your contacts entering your business information in their CRM system.

## **If I add a contact, who can see the information?**

If you add a contact who is not in the system already, only you, and others in your company can see the information. The contact entered is placed in your MyContacts list. Anyone outside your company searching for that contact will receive a "Not found" message. This is just like a normal CRM system.

## **Can other users in my company export or copy my contacts?**

No. "Dave" cannot list all of "Jane's" contacts, nor can he export them or copy them. ChannelPace allows users within the same company to share contact information in the system, but users may only ever export what is in their own MyContacts list.

**Got a question? Email us at [info@channelpace.com](mailto:info@channelpace.com)**

Visit <http://channelpace.com> for more information

Some services referred to in this communication may require a paid subscription.

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