

## QUESTION OF THE DAY

**How can Sales and Marketing break down barriers and combine forces to create a world-class customer journey?**

**TIER**

Technology  
Executives  
Roundtable

July 2022

# Atlanta Technology Executives Roundtable

**Where Technology Sales & Marketing Meet:  
A Look Inside the CMO/CRO Relationship**

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*Please hold until  
the session begins*

TEER | Technology Executives Roundtable





# David Brinkman

President 2022

Technology Executives Roundtable

Founder & CEO, CAMDA Investments

**Your Forum**

**Candid discussion**

**CEOs, CFOs & Investors**

**Subject Matter Experts**

**Complex leadership issues**

**Share, challenge & test ideas**

# ZOOM Etiquette

- “Pin” the TER video box on your Zoom feed
- Please mute audio/video during presentations.
- Chat if you want to ask a question.
- We are recording for educational purposes; this is not specific legal, accounting or tax advice; consult your advisor

# Thank you to our generous ATL sponsors

**Arketi Group:** Digital marketing for B2B tech companies

**Dualboot Partners:** on-demand product design and software engineering

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## SPONSORS







# Updata Partners Overview

July 2022



# 20+ year history of investing in B2B software

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*Built on a foundation of B2B software operating experience*

Led by former software operators, Updata has backed the top entrepreneurs in **B2B Software** for more than 20 years. We look for those rare leaders with both a **Growth Mindset** and an appreciation for **Capital Efficiency**. Typically, they have built **Recurring Revenue Models** with a **Repeatable Go-To-Market** engine and **Strong Unit Economics**.

# Updata's Investment Spec

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## ↙ B2B Software & Software-Enabled Businesses

- Deep Updata operating experience
- Predictable, recurring revenue streams
- Scalable business models with high gross margins, low capex

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## ↙ \$5M - \$50M Revenue

- Proven product/market fit
- Demonstrated sales repeatability beyond the CEO/founders
- Customers and prospects are the foundation of due diligence

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## ↙ 25% - 100%+ Growth

- Historical growth is often predictive
- Updata unit economics analysis offers lens into future scalability and profitable growth
- High growth companies receive premium exit valuations

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## ↙ Bootstrapped or Lightly Capitalized

- Customer funded, not VC funded
- Financial discipline reduces risk of capital losses
- Disproportionate influence as first institutional investor

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## ↙ Non-Bay Area

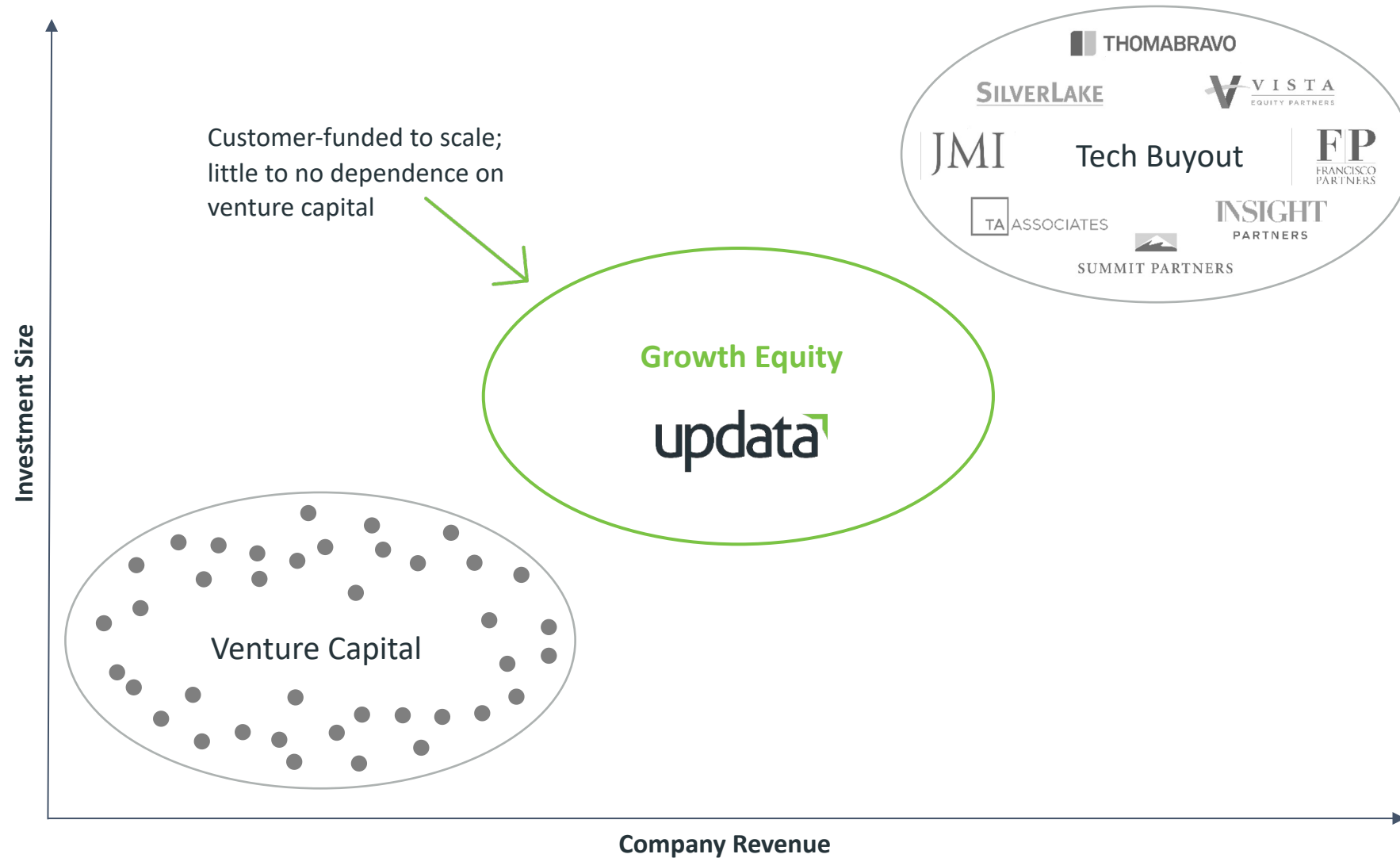
- Avoid hype and boom/bust cycles
- Undercapitalized geographies offer better entry prices
- Cheaper and more loyal talent, lower-cost overhead

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## ↙ \$15M - \$100M+ equity

- Meaningful ownership (minority or majority)
- Use of funds for M&A, scaling operations, launching new products and/or entering new markets
- LP co-invest avoids GP syndication on larger deals

# Addressing the gap between VC and tech buyout



# Broad market coverage

All investments are outside the Bay Area





# EQUIPPING CHANGE AGENTS TO TRANSFORM THE WORKFORCE



# Industry Challenges in Employee Experience

**Industry Software Focus:**

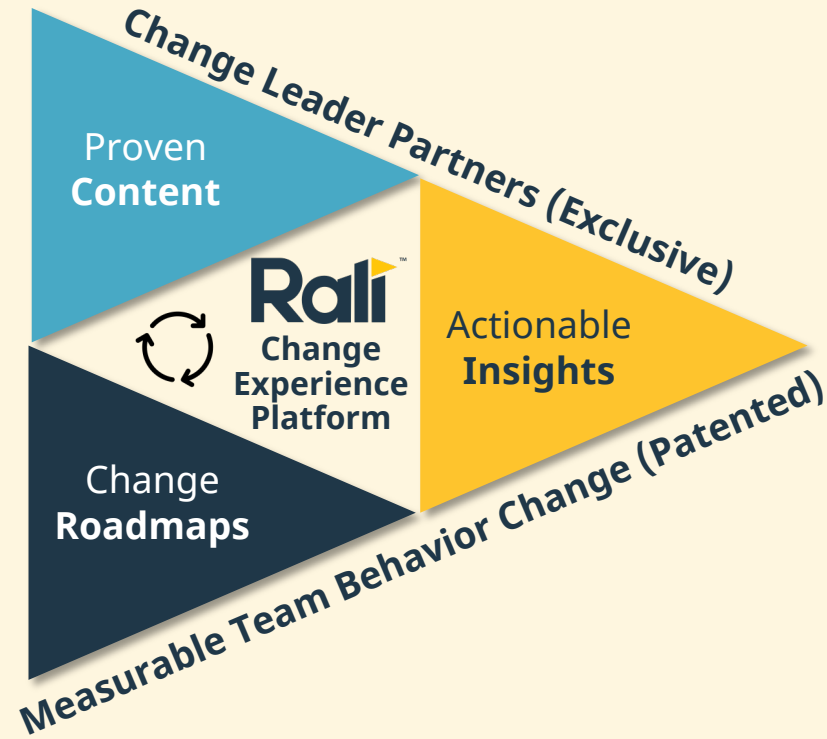
Obsession with individual compliance and evaluations.

**Missing Focus:**

Driving team development and behavior.



# B2B Change Initiative Ecosystem





# Rali Customers are Satisfied and Loyal



**30+ Customers**  
in 2021

**20+ Content Partners**

**92% ARR**  
Renewal

**\$500K**  
Largest Deal

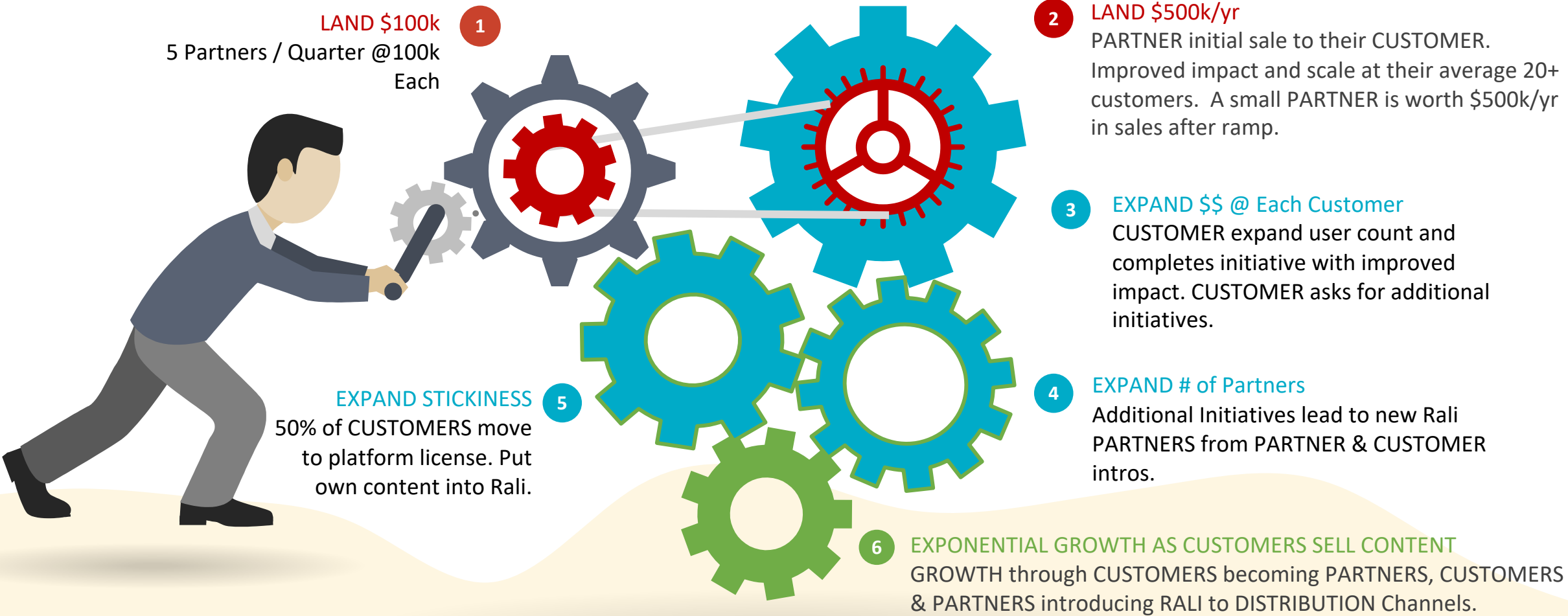
50% Used an Initiative  
and 50% Custom Built  
One

Largest Change Journey Deployment  
**16,000 DEI**  
Over 3 months



# Rali's Flywheel & Inflection Points

Powered by **PARTNERS** and **CUSTOMERS**





WWW.GETRALI.COM

[Rich.Cannon@getrali.com](mailto:Rich.Cannon@getrali.com) – 770.843.2126

[Rusty.Gordon@getrali.com](mailto:Rusty.Gordon@getrali.com)

Connect with Rich on LinkedIn



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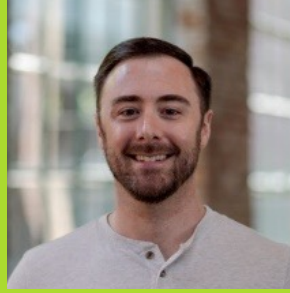
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# Panelists



MODERATOR  
**Mike Neumeier, APR**  
CEO  
Arketi Group



**Alex Latraverse**  
CRO  
Flock Safety



**Sarah Stansberry**  
SVP of Segment Marketing  
Fiserv



**Heather Teskey**  
CMO  
Deluxe



**Mike Toplisek**  
President  
EarthLink

# Panelists' Contact Information

**Mike Neumeier, APR**

CEO  
Arketi Group

[mneumeier@arketi.com](mailto:mneumeier@arketi.com)

**Alex Latraverse**

CRO  
Flock Safety

[alex@flocksafety.com](mailto:alex@flocksafety.com)

**Sarah Stansberry**

SVP of Segment Marketing  
Fiserv

[sarah.stansberry@fiserv.com](mailto:sarah.stansberry@fiserv.com)

**Heather Teskey**

CMO  
Deluxe

[heather.teskey@deluxe.com](mailto:heather.teskey@deluxe.com)

**Mike Toplisek**

President  
EarthLink

[mike.toplisek@elink.com](mailto:mike.toplisek@elink.com)

**Contact Info for Fund of the Month**

Update Partners  
Jack Zollicoffer  
Partner  
[jzollicoffer@update.com](mailto:jzollicoffer@update.com)

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Q&A  
with today's panelists

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August Meeting  
(in-person or virtual)

**Key Trends & Strategies for  
the Post-Pandemic Workplace**

**August 16, 2022**

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Technology  
Executives  
Roundtable