



Relate Research & Technology Co.

Introduction – July 2024

Team.



Rowland Hirst
Co-Founder, CEO

Relate is his third start-up
Over 20yrs in asset management
Advisor to over 100 US and Canadian
Asset Managers - Macquarie Group (USA)



Alan Darwin
Co-Founder, Legal Affairs

Over 25yrs in financial services
Forum 360 is his second start-up
Executive Director - JP Morgan
Policy Lawyer - ASIC



Geoff Blaisdell
Co-Founder, CTO

Over 30yrs practicing at the intersection
of finance and technology.
Head of Technology - Western Asset
Management



Tom Keenan
Co-Founder, Chief Revenue Officer

Over 25 years sales leadership in financial
services.
CEO Singapore, Head of Wholesale Asia -
Robeco
Head of Private Banking Distribution,
Asia ex-JPN - Blackrock



Grant King
Advisory Board

Guides our board of a public company.
Board member - HSBC Australia
Chairman - Business Council of Australia
CEO - Origin Energy (for over 16yrs)
Board Member - BHP



Noelle Mykolenko
Advisory Board

The custodian of IP from over 50 years
evaluating trust.
CEO - Trusted Advisor Associates LLC
Adjunct Professor - University of Virginia,
Darden School of Business



Dick Taggart
Advisory Board, Boston Operations

Over 35yrs of leadership in financial services
and technology.
EVP, Head of Alpha Services - State Street
EVP, Global Operations Head - SSGA



Sayee Bapatla
Chief Architect

Passionate about developing generative
AI solutions for our clients.
Chief Architect - Wells Fargo
Chief Architect - BNY Mellon
Chief Architect - TD Ameritrade



At Relate,
We help companies scale and measure the most
important part of their relationships...

Trust.

Trust metrics from standardized data

What's in our name.



Technology

- Standardized measurement across all meeting types, in-person or virtual;
- Integrate with your everyday use meeting and CRM platforms;
- Scales strong human connections;
- Embeds L&D into your everyday use platforms;
- Embeds commercial discipline and rigour into your meeting experiences.

Research

- Track attendee behavior in meetings over time;
- Enhance teamwork to address customer needs quickly;
- Score and coach employees to build trust more effectively and improve top line performance;
- Benchmark the performance of product teams;
- Rapid insights from anonymized meeting behavior of consumers in your industry;
- Ask Sandi to write marketing material based on what is on the consumers mind that day.

Integrate then Relate



Deploy the objective measure of trust into your everyday use platforms.

Relate can be used in all meeting formats on your everyday use meeting and CRM platforms: Zoom, Teams, Salesforce...

Relate embeds the rigor you need across the three phases of a great meeting - prep, execution and the all important ask.

Relate helps you collect 4x the meeting intelligence to the same standard in every meeting.

Relate replaces your need for manual note-taking and dramatically improves the quality and speed of feedback to your product team members and management.

Summary, Q&A, agenda, follow-up delivered within minutes.



and more

The screenshot shows a meeting interface with a video call in progress. The main window displays a grid of participants: a man (Adi Kapoor) in the top left, a woman (Beth Davies) in the top right, a man (Laurence Gilbertson) in the middle right, and a woman (MJ Price) in the bottom right. A sidebar on the right, titled 'Relate Tools', contains several widgets: 'Messaging', 'Feedback', 'Analytics' (highlighted), and 'Resources'. Below these is a 'Sentiment' widget showing 'Overall real-time analysis' with a 'Neutral' sentiment score of 0.45 and a line graph comparing 'Participants' (yellow) and 'Host' (blue) sentiment over time. Other widgets include 'Carbon saved' (16,000 lbs), 'Time saved' (152 hrs vs traveling), and 'Fulfilment' (34 for 'How to invest').

Re-imagine your webinars



Enable your teams to manage their own events

Stop guessing what your clients want to hear and let them set the agenda

Enable your clients to express themselves in multiple ways, maximizing actionable data

Build scale without sacrificing human connection



Trust is measured - over time!



“Sandi is Forum 360’s Generative AI analyst. The brains behind the Relate platform”

Sandi* analyzes and scores over 28 traits for the factors from which we measure trust...

Over time!

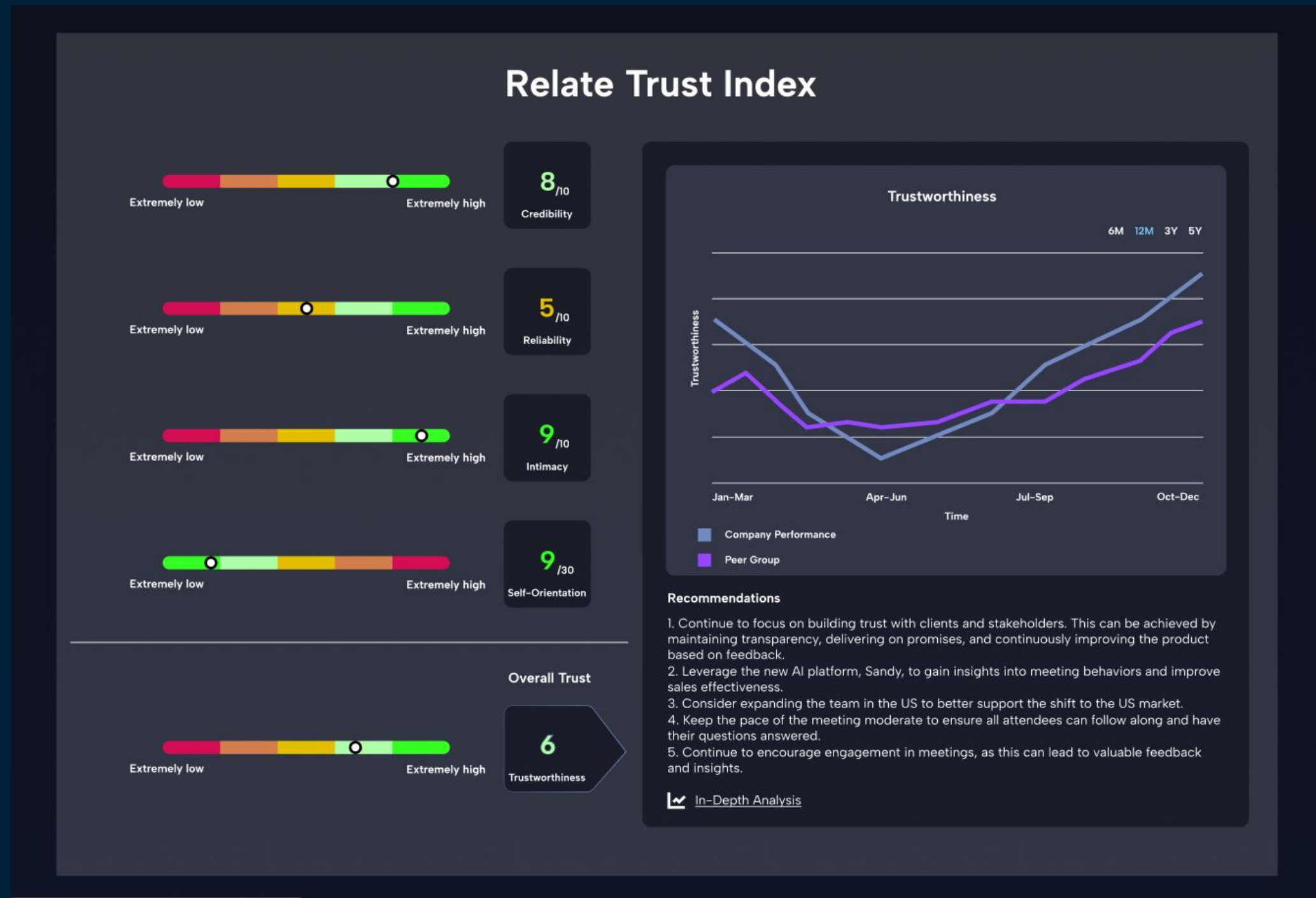
How well are your representatives building your story. How did they do versus the last meeting or the last meeting with this client;

The analysis is sent to your rep’s email, Relate Portal and your CRM within minutes;

Our Generative AI also monitors for risks against your code of conduct; and

Monitors how well the key selling points for this specific product are being conveyed.

*Sensitive Artificial Native Distributed Intelligence - SANDI



Relate's commitment to you on Trust



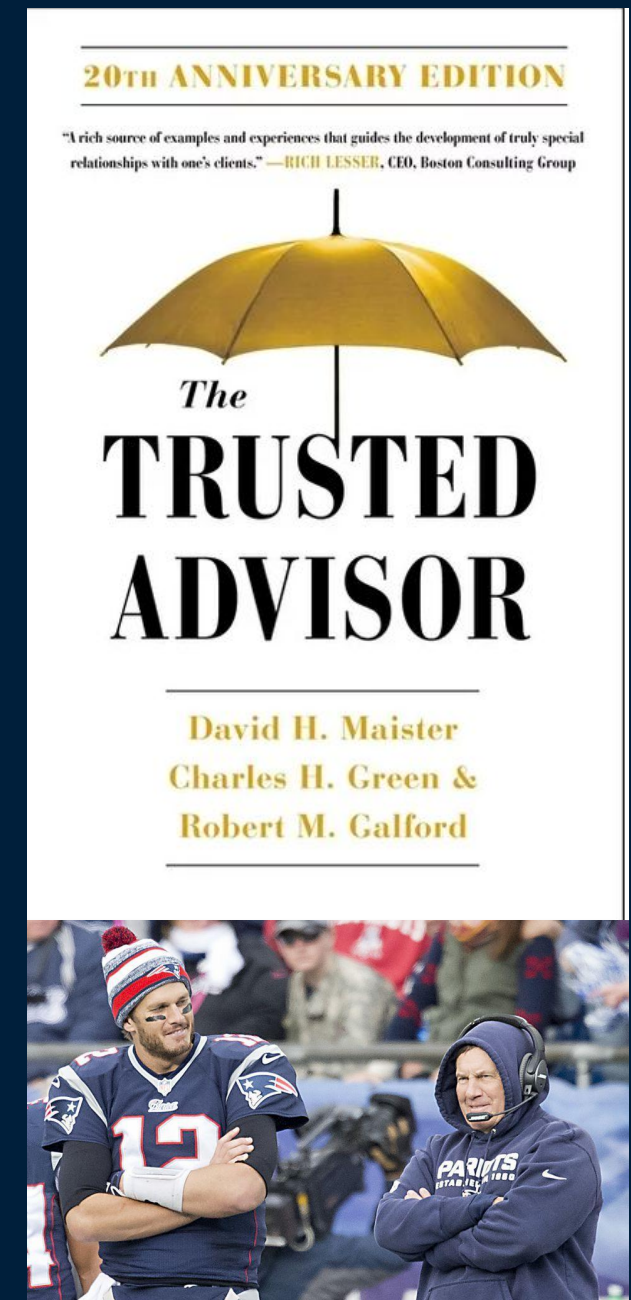
- 1) Trust can be objectively measured, we have proven this backed by the authors of The Trusted Advisor;
- 2) We can show you that trust can be coached and integrated into everyday use platforms; and
- 3) We will help you link that objective measure of trust to top line performance.

Relate has partnered with the team who 'wrote the book on Trust', drawing on 50 years of experience coaching what matters to your customers.

$$T = \frac{C + R + I}{S}$$

Credibility Reliability Intimacy

S
Self-Orientation



Trust drives better performance



TRUST is BUILT over time....

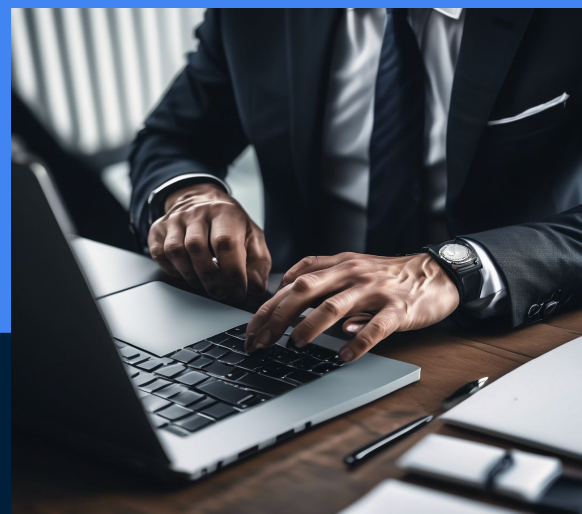
...and LOST in a moment

Credibility



Scoring **credibility** ensures appropriate curiosity and questioning to better understand customer needs and motivations.

Reliability



Scoring **reliability** means more rigor & discipline to preparation, execution and follow up from every meeting.

Intimacy



Scoring **Intimacy** means encouraging more openness and human connection which is critical to more trusting relationships, but often overlooked.

Self-orientation



Scoring Self-orientation helps avoid:












- Irrelevant name dropping
- interrupting
- Blaming
- Unwillingness to accept responsibility

For any business relationship



- Your sales and revenue generating teams;
- Your sales managers;
- All other client facing teams and their leaders;
- Investor relations teams;
- C-Suite and senior people leaders;
- Executives and their teams in fiduciary positions - accountants, lawyers, wealth managers, management consultants etc; and
- HR executives seeking a new approach to learning and development and to implement lasting change management.

No direct competition.

											
Research house	✓	✓	-	✓	-	-	-	-	-	-	-
Benchmark provider	✓	-	-	✓	-	-	-	-	-	-	-
Survey house	✓	✓	✓	✓	-	-	-	-	-	-	-
Sales Meeting Enablement Platform	✓	-	-	-	✓	✓	-	-	-	-	-
Collaborative Selling Software	✓	-	-	-	-	-	-	-	-	-	-
Employee Training Platform (LMS)	✓	-	-	-	-	-	✓	-	-	-	-
AI-guided selling and marketing	✓	-	-	-	✓	-	-	-	-	-	✓
Sales-pipeline automation	✓	-	-	-	✓	✓	-	-	-	-	✓
Transcription services	✓	-	✓	-	✓	✓	-	✓	✓	✓	✓
Video Communications	✓	-	-	-	-	-	-	✓	✓	-	✓



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