

Multi-Platform Intelligent, Actionable Notepad Application

Technology

Intellinote

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**Tony Lopresti
CEO**

BIO: Tony is an entrepreneurial executive with significant experience in software sales, product management, marketing, strategy, and operations. Throughout his 18 year career, Tony has successfully built companies, created high performing teams, and launched new products. As Co-founder and Chief Executive Officer of Intellinote, Tony is responsible for the company's strategy, products and sales.

Before Intellinote, Tony was Senior Vice President of Sales and Marketing at Clarabridge, where he took Clarabridge from pre-revenue to the 7th fastest growing SaaS software company in the US. At Clarabridge, Tony drove global operations, had 45 direct reports, and negotiated multi-million dollar contracts with numerous Fortune 500 customers. Prior to Clarabridge, Tony was responsible for all software products and marketing at a large subsidiary of Monster Worldwide, where he grew SaaS revenues 300%. Before Monster, Tony held senior management positions in product and IT consulting services at American Management Systems.

Tony has a BS in Systems Engineering from the University of Virginia. While earning his MBA in Entrepreneurship from the Anderson School at UCLA, Tony worked with Intel's marketing and venture capital organizations.

About Intellinote:

Intellinote is a multi-platform (web, mobile, and tablet) software application that is taking notes to the next level. The Intellinote application is an intelligent notepad for individuals, teams or entire companies to capture intelligent notes, turn them into actions, and to seamlessly get work done, on any device, anytime, anywhere.

**Interview conducted by:
Lynn Fosse, Senior Editor
CEOCFO Magazine**

CEOCFO: Mr. Lopresti, what is the concept behind Intellinote?

Mr. Lopresti: Intellinote is a productivity application that is changing the way people work through what we call intelligent notes. In a nutshell, the application allows individuals and teams to capture information, turn that information into actions, collaborate and get work done all in a single integrated platform on any device, anywhere, anytime.

CEOCFO: What has been the method for how to do all of that before Intellinote?

Mr. Lopresti: Intellinote was really born out of frustration that myself, Bill Welch and Gene Sohn, who are the other two co-founders, had around capturing information in a manual format, whether that be writing notes on notepads, capturing information on whiteboards, or sending people voicemails. The way that individuals capture information and ultimately organize that information and share it with others has been broken for in the workplace forever, and we felt that there was a better way to approach this. That became the genesis for Intellinote. Of course, not being able

to capture, share, and organize information makes it much harder to get work done than it needs to be. People spend time sifting through information. They spend time transcribing information from one place to another place. The systems you use to take notes is often different from those used to collaborate, which is often different from the business applications that you use to execute various functions of your business. And all that is totally disconnected from how people manage projects. We felt that if we could bring all of those things together – the intelligent note-taking, the collaboration, the integration with the applications that people use today, and incorporate project management features into a single business application, we could really solve this problem in a way that it has never been solved before.

CEOCFO: Would you give us a concrete example, of a common task and how it would go through your system and perhaps something more complicated?

Mr. Lopresti: Let's think about how, for example, a proposal would be done in an organization without Intellinote. An individual who is responsible for that proposal often has to hunt through his or her own notes that may reside in various notebooks, or go through emails that they have from their customers or teammates looking for the proposal. Maybe they have to recall from their own memories the information about the proposal effort. There are often gaps in terms of what that person needs, so they have to send emails, have phone conversations, and hold meetings. They likely need to collaborate with others around the aspects of the proposal, and the act of

coordinating who is doing what and when each of those tasks is due, is often not clear and time-consuming to coordinate. Ultimately, delivering that proposal to a customer takes much longer and has more effort associated with it than it really needs to, and the overall quality is often not as high as it could be because of all of those challenges. That is what is happening today without Intellinote – reliance on paper and email. With Intellinote, the same individual can capture his information all in one place via the devices and interfaces that he uses today, such as his iPhone, iPad or desktop web browser. The information can be notes, files or voice annotations or images or even content that is within other applications that the person is utilizing. All of that information can be organized in one place and easily retrieved anywhere, anytime. Intellinote then allows him to seamlessly create tasks that can be assigned to himself or to other people. He can collaborate seamlessly with others without having to move information out of Intellinote into an email. He can invite others to contribute directly to the proposal effort. Importantly, Intellinote allows all of the tasks, information and collaboration to be oriented around a single work effort that anybody who is associated with can track via metrics. It is simple to understand, for example, who has been assigned what task, and where the effort is in terms of completion. This results in everybody being on the same page and contributing toward common goals, and ultimately working more efficiently and effectively, while also delivering a proposal that exceeds the client's expectations.

CEOCFO: What is one of the more difficult challenges that people face and how can Intellinote help?

Mr. Lopresti: We have a customer whose business is to manage and inspect physical facilities for customers who are looking to locate staff in those facilities around the world. Prior to Intellinote, this customer had a workforce of inspectors that went out to these facilities and on pen and paper wrote down what they were experiencing.

They went through a checklist manually of what to inspect, documented on paper what they found as part of the inspection, and took pictures on a camera that then had to be downloaded and married back up to their inspection notes. They would then go back to their hotel the day after doing an inspection, download the photos and integrate all of the inspection notes. In some cases, they would tape-record their notes that were captured during the inspection process. All of that was time-consuming, it was manual, and it involved integration of a lot of different pieces of information. It was error-prone and not consistent from person to person and did not allow the broader organization to have good transparency to know what was going on with these inspections on a real-time basis. Additionally, it did not allow them to collaborate around the inspections, such as providing

“With Intellinote, you can better serve your customers, executing actual goals, and increasing your bottom line.” – Tony Lopresti

feedback to an inspector on an additional level of inspection detail. With Intellinote, these inspectors now can go out into the field with iPads, take their notes, right on their iPads, take photos of what they are inspecting, dictate voice notes, and manage an inspection checklist. As that information is being captured, it is captured initially offline if that inspector is in a place that does not have any sort of connectivity, but as soon as that inspector gets to a place that does have connectivity, it immediately syncs online, which then provides visibility to anybody who needs access to that inspection. Intellinote allows for immediate collaboration associated with each inspection, and because all the information is together in one place and integrated, there is less chance of errors or information getting lost or missed.

CEOCFO: What were some of the challenges in putting the technology together?

Mr. Lopresti: We felt very strongly that in order for people be able to capture information, organize it, share it and leverage it within the workforce (as opposed to how you capture information within your consumer life) we needed to integrate all of the business applications that people were currently working with into Intellinote. We didn't want to force people to stop utilizing tools that they were already taking advantage of, and that are working for them, so instead, we integrate with what works. For example, we integrate very seamlessly into email. We are building integrations into Google applications and Salesforce and other business applications that people are already using today. That ultimately binds together the business applications that people are using and makes them more valuable, allowing work to get done more effectively. That integration was a key piece of the puzzle. A second piece of the puzzle was providing value from an individual all the way up to an entire company. We found that many of the business applications that people were using to collaborate and get work done were really geared more toward a team or a company. In my opinion, if you have a business application that is geared for a team or a company, It often becomes very difficult to get individual workers to adopt that technology, even if it is a good one. On the other hand, Intellinote is built to provide value for an individual. People can use Intellinote to become more organized, more prepared, and more able to get their work done. After using Intellinote along, that individual can share with his or her team and eventually with the entire company. This allows for a seamless adoption flow within organizations that is not possible with other solutions. Finally, we created within Intellinote a capability called our Intelligent Knowledge Delivery Engine. This is an under-the-hood engine that proactively feeds information to individuals that can help them accomplish their goals. For example, if I am working on that proposal that I talked about earlier, Intellinote will be able to figure out if somebody else

within my organization has worked on a similar proposal and suggest information that might be helpful in my current proposal effort. This avoids the problem inherent in tools that capture information but then become cluttered and disorganized over time. Through this underlying technology, Intellinote helps to provide information to people automatically, so that they are able to leverage it and find it without having to hunt through the clutter.

CEOCFO: How do you reach potential clients?

Mr. Lopresti: We have three ways to reach clients. One is through our website. We have individuals that come to our website from marketing efforts, but at this point it is mostly through word-of-mouth. They can sign up for a trial of Intellinote themselves without any interaction with our company. They can begin to use it and invite others, and that grows virally within an organization. Second,

we have a sales team that we are building, which prospects into teams, whether they be sales teams or marketing teams or product teams, to help get entire teams on Intellinote. Third, we take advantage of partnerships with companies we integrate with and leverage the customer ecosystems that those technology companies already cater to.

CEOCFO: Why should the business community pay attention to Intellinote?

Mr. Lopresti: Intellinote is built to enhance the efficiency and productivity of the modern workforce, something we call Workforce Operations Management. Just as traditional operations management solutions optimize the processes surrounding an organization's physical assets, Intellinote optimizes the workflows surrounding an organization's people assets. We are really changing how people

accomplish work. If you look at the everyday work that people are doing today in email, on paper, in phone calls or in meetings, that everyday work is inefficient, cumbersome and it's difficult for people to communicate and collaborate. Increasingly, people are distributed around the world, which makes it difficult for them to get together and share information. What we are doing is providing a way for all of those everyday projects and collaborative processes that would otherwise be done using all of these inefficient means, to be done in a technology that is simple to use, easy to on-board, and helps people spend less time searching and looking for information and more time actually getting their jobs done. With Intellinote, you can better serve your customers, executing actual goals, and increasing your bottom line.



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