

# Press Kit

**OrderLogix**<sup>™</sup>  
Greater Insight.  
Complete Control.

# Table of Contents

**About Our Company** 3 – 7

- Profile 3
- Company Timeline 4 – 5
- Bios 6 – 7

**Why OrderLogix?** 8

**Overview of Products & Services** 9 – 11

- Our Products 9
- Our Services 11

**Corporate Fact Sheet** 12

**Press Releases** 13 – 15

**Press Contact Info** 16




## About Our Company

### Profile

In 1997, the OrderLogix™ management team began as a collaboration between a core group of employees with expertise in business process optimization, flexible database solutions, retail order management systems, and real-time call center automation. Today, our company delivers leading-edge, highly scalable *order management solutions* for small to midsize businesses, with a premise-based solution for our larger customers.

Since the beginning, our company has focused on understanding the needs and nuances of marketers – whether they be sales- and performance-centric direct response companies, fast-moving e-commerce firms, or comprehensive multichannel retail corporations. And it has certainly been a challenge with the rapid pace of technology growth – from shared server environments to hosted solutions and data security challenges – and in a marketing environment in which multichannel marketers must choose between an increasingly wide array of go-to-market strategies and tactics.

From our inception we have remained focused on several core objectives:

-  Deliver solutions that are leading-edge, intuitive and easy to use
-  Provide marketers with scalability and portability – so they can grow quickly, match revenue to expense, and change suppliers to meet growth needs without major risk or interruption
-  Deliver applications that increase transparency for the marketer – providing channel visibility, decision support tools and performance metrics

We will continue to build our business with the marketer in mind – providing our clients with the straightforward order management tools necessary to make quick decisions in response to changes in the market, all with a pay-as-you-go model that eliminates any huge capital expense.

## Company Timeline

1997

TekData, Inc., founded by Jay Gowell, began as an independent software consultancy mainly focused on Direct Response industry clientele. Working with Jay Gowell, Soty Giftos was instrumental in the development of custom programs for Direct Response, later leaving to form Giftos & Associates. Additional solutions were developed for over a dozen clients, focused on order management, media buying and results tracking, and call center automation.

2001

Giftos & Associates began as an independent software consultancy that focused primarily on Direct Response industry clientele. Custom programs were developed for several clients, focused on web-based order management, business process automation, and call center automation.

2003

Giftos and Gowell merge clients; web- and premise-based intellectual property and support agreements also merged under the On-Line Technologies (OLT) banner. OLT's mission was to provide customer support for existing clients, while embarking on a unified, web-based *best of breed* order management application development that leveraged leading-edge technologies including IP. The beta version of the premise-based On-Line Call Center (OLCC) was released.

2004

OLT releases premise-based production version of the flagship product, On-Line Call Center.

2005

OLT completes upgrade of all pre-merger clients to On-Line Call Center (OLCC) platform.

2005

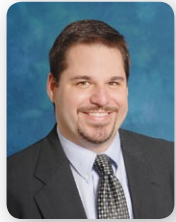
OLT releases Commerce Center product to satisfy market demand for clients with existing call center infrastructure, but with requirements for a *best of breed* order management solution. Hosted version released to market.

## Company Timeline

- 2007** OLT releases Commerce Center and Call Center v2.0 and v 2.5 with major product extensions.
- 2008** OLT doubles staff as the company transitions business from *customized solutions provider* to *service provider*. OLT embarks on major infrastructure upgrade designed to position the company for significant growth in clients, transaction volumes, overall delivery capacity, and security compliance.
- 2010** Infrastructure upgrade complete. PCI Level 1 Service Provider standards met. Company name changed to OrderLogix™. Flagship product names changed to *Commerce Edition* and *Call Center Edition*. Company focus expands to include eCommerce and multi-channel retail market sectors.



## Executive Bios



### **Sotero Giftos, Jr., *President and Founder***

As the technical leader of OrderLogix, Mr Giftos is a hands-on executive that directs the overall software development strategy within the organization. Working closely with partner Jay Gowell, he has been responsible for positioning the company as the leading provider of best of breed order management technologies to the direct response industry. Prior to co-founding On-Line Technologies – and its renaming as OrderLogix in 2010 – Soty ran Giftos & Associates, a developer of custom business solutions that focused on order management and call center automation. He also served as VP and CTO for an ecommerce sales and marketing company, was responsible for IT Operations at a nationally regarded direct response contact center, and holds a BS in Computer Science from the University of Southern Maine.



### **Jay Gowell, *Executive Vice President and Co-Founder***

Providing executive direction throughout the organization, Mr. Gowell's two decades in the technology field provides an invaluable set of experiences across many industries. Prior to forming On-Line Technologies with Mr. Giftos, he served as Director of Information Services at a large national call center. He was also the founder of TekData, a software solutions company specializing in business process optimization and contact center automation. Jay was also the President and co-owner of Coastal Computer Center, a regional computer technology provider and software engineering services firm. He is an accomplished software development professional in his own right, having built successful applications for order management, call center automation, and a comprehensive platform for media tracking and reporting.



### **Bill Southwick, *Vice President Sales and Marketing***

With a strong background in developing and directing business, marketing and sales strategies, Mr. Southwick adds the skills and experience necessary to take OrderLogix to the next level. He is responsible for directing the company's new business development team, managing the client relationship team, and is an invaluable member of the OrderLogix executive management team. Prior to OrderLogix, Bill was responsible for Outbound Sales Operations at Media Power, and provided senior leadership at AT&T Government Solutions as a Program and Project Manager. He is an expert at the inner workings of call centers, customer service and sales processes. Outside of work, Bill is a Notary Public for the State of Maine, on the Board of Directors for MacArthur Home for the Aged and The Maine Way, Inc., and a Chairman and spokesperson for Keeping Neighbors Warm, a non-profit fuel assistance program.



### **Jill Shannon, *Vice President Finance***

Ms. Shannon provides the OrderLogix executive team with substantial financial expertise, senior management skills, market segment knowledge and the perspectives of an entrepreneur; a former owner of a call center specialized in high volume sales and customer service for the direct response industry, she is adept at managing in a rapid growth environment and can be relied on for her sound financial and business knowledge. As Vice President of Finance for OrderLogix, Jill is responsible for finance, accounting and overseeing the company's HR functions. Previously, she was Vice President of Finance and a co-owner of ListenUp Contact Solutions, a Portland, Maine-based call center with over 400 employees. Jill graduated from the University of Southern Maine with a BA in Accounting.



### **Lisa Dominicus, *Director of Client Services***

As Director of Support Services at OrderLogix, Ms. Dominicus is responsible for providing implementation and support for the OrderLogix client base, ensuring that client needs are met quickly and efficiently. As a software developer and a direct response marketing professional with over 14 years experience, Lisa brings several important perspectives to her role within the company: in addition to her in-depth knowledge of the OrderLogix product, she is experienced in direct response operations – from sales channels to media buying and logistics. Prior to joining the company, she had a successful career at Talk America, a large, national direct marketing firm, and Vital Basics, a multivitamin company where she was instrumental in supporting performance of sales, customer service, media, and purchasing departments. Lisa graduated from Andover College with a BS in Applied Sciences and Computer Sciences.



### **Max Riseman, *Applications Programming Manager***

Mr. Riseman is responsible for building a bridge between the needs of the OrderLogix customer and the execution of the OrderLogix product suite. A 15-year veteran of the direct response industry, he is an experienced programmer in Visual Basic.Net for Windows and web applications, as well as database development using Microsoft SQL Server. His perspectives as a business owner, coupled with outstanding engineering and software skills, makes him an ideal member of our team. Max has owned two companies, was the CIO of IWORX, Manager of IT for Beacon Marketing, and a software developer for TekData, Inc. He has a BS in Meteorology from Plymouth State University, with a minor in Technical Math.



### **John Higgins, *Director of Managed Services***




Mr. Higgins has been instrumental in developing streamlined processes to ensure that OrderLogix is effective and efficient in the execution of new client implementations, training programs and processing services. As Director of Managed Services, his expertise in customer service and project management have been key to our high level of customer satisfaction. Prior to OrderLogix, John spent nearly 20 years as the IT Services Manager at Cole Haan and as the Regional Technical Manager for its parent company, Nike. There he managed a substantial technical team to support the company's network, servers, desktop, and help desk.

## Why OrderLogix™?

Since 1997, we have been developing leading-edge solutions to solve the challenges of small to midsize businesses. Focused on understanding the needs and nuances of marketers, we started as a collaboration of entrepreneurs with expertise in business process optimization, flexible database solutions, retail order management systems, and real-time call center automation.

Reflecting today's growing world of e-commerce and other direct-to-consumer sales channels – and the critical need to make sense of complex order data and manage the logistics of the evolving marketplace – we changed our name from On-Line Technologies to OrderLogix to better express our focus on smarter, best-of-breed order management solutions.

Simply put, the OrderLogix mission is to:

-  Provide marketers with straightforward, intuitive and easy-to-use order management tools
-  Help our clients make decisions quickly to respond to changes in the market
-  Deliver solutions without huge capital expense, using a pay-as-you-go model

The OrderLogix solution increases the transparency of marketers' processes, providing channel visibility, decision support tools and performance metrics. It gives them the scalability and portability they need to grow quickly, match revenue to expense, and change suppliers to meet growth needs without risk or interruption.



## Overview of Products and Services



### Our Products

Today's most successful marketers clearly understand the factors driving customers to purchase, and optimize each and every customer experience and touch-point. The order management environment provides the ideal point at which to capture and measure critical performance data. And most importantly, it provides clients with the ability to monitor, manage and quickly adjust all key aspects of the sales process – scripts, offers, continuity, discounts, up-sells and cross-sells, and other elements of customer satisfaction – in real-time to achieve the best results.







Campaign management and performance has been a core competency at OrderLogix since the founding of our company. Regardless of the channel, our platform monitors campaign sources so that clients can quickly evaluate marketing channel performance, campaign performance, resolve problems quickly, and leverage opportunities to close the sale. Whether a campaign's telemarketing script needs to be altered, pricing needs to be controlled, or an offer needs to be changed, we can make it happen – on the fly.

Proper order and campaign management can streamline a company's entire fulfillment process, eliminating hours of unnecessary work and minimizing paperwork for the entire team. This enables OrderLogix clients to focus on results and ensure customers get deliveries on time, boosting customer satisfaction and long-term loyalty.

OrderLogix delivers a hosted, *best of breed* order management system for the SMB market designed to match revenue to expense, and a premised-based version for larger clients.

The OrderLogix **Commerce Edition** is the perfect order management and customer service solution for small and midsize businesses that do not require call center capabilities. It will automate daily processing tasks, enable first contact resolution to customer service inquiries, and provide consistent reporting across all order channels.

Our comprehensive system coordinates:

-  Customer Contact
-  Order Management
-  Campaign Management
-  Payments
-  Fulfillment
-  Customer Service

The OrderLogix **Call Center Edition** brings together call center, customer service and order management functionality in a single modular system. It includes all of the outstanding features of OrderLogix *Commerce Edition*, and adds some of the most respected call center features in the industry.

In fact, many of today's top high performance call centers use our back end systems, which seamlessly integrate with most telephone or ACD (Automated Call Distribution) systems – reducing remedial tasks, generating accurate blended call and order reports, and providing real-time performance dashboards.

This comprehensive system coordinates all of the **Commerce Edition** features:

-  Sales Management
-  Dynamic Scripting Engine
-  Human Resources – Time Card
-  Human Resources – Commissions
-  Call Center Dashboards and Alarms
-  Expanded Reporting

## Our Services

### Implementation, Migration and Managed Services

Specialized implementation teams work with our clients to assess business needs and configure systems to meet the needs of the individual client. We can provide:

- Assistance with data migration from existing client platforms or service providers
- Guidance in implementation offers and sales strategies
- Ongoing campaign setup and configuration
- Daily management services by OrderLogix experts to meet specific client operations needs

### Integration and Customization

OrderLogix can also integrate our platform with virtually any ERP or accounting system, providing customization as necessary to meet any unique requirements. Designed to deliver optimum sales performance, our proven approach is the key to success for:

- Major providers of print, broadcast and DRTV specific media
- High performance specialized call centers
- The industry's largest call centers, designed to handle high volume traffic
- Fulfillment centers

### Training

Helping you reduce implementation time for your organization, we can offer two different types of training:

- "Train the Trainer" modules allow you to create your own training department to teach personnel how to use our systems
- Customized user training for all areas of functionality, conducted by experienced instructors, can be provided using online desktop sharing applications

## Corporate Fact Sheet

### Overview

OrderLogix™ is a leading provider of advanced, business-to-consumer *order management solutions* to the direct response, e-commerce and multi-channel retail markets. Based in Portland, Maine, the company provides best of breed software that can be easily integrated with most major ERP and accounting applications. OrderLogix delivers a complete suite of implementation and professional services, integrating with marketing data sources, call centers, and other back-end service providers. For over 13 years, the people at OrderLogix have become widely regarded for their leading edge software applications, data collection platform, sales conversion tools, channel analytics, and integration expertise. OrderLogix customers typically achieve greater visibility and insight into their marketing and sales channel performance, improved operational efficiencies and increases in revenue.

### Executive Management

**Sotero Giftos, Jr.**, *President*

**Jay Gowell**, *Executive Vice President*

**Bill Southwick**, *Vice President of Sales & Marketing*

### Offices

#### Physical Address:

OrderLogix  
605 US Route 1  
Scarborough, Maine 04074

#### Mailing Address:

OrderLogix  
P.O. Box 6798  
Scarborough, Maine 04070-6798

[www.OrderLogix.com](http://www.OrderLogix.com)

### Financial

OrderLogix is a privately-held company.

FOR IMMEDIATE RELEASE

Contact: Lynn Crothers  
Perry & Banks  
207.761.5957 x321  
lcrothers@perrybanks.com



## OrderLogix™ Debuts at Response Expo in San Diego *On-Line Technologies Announces Launch of OrderLogix™ Brand*

**San Diego, California – May 11, 2010** – OrderLogix™, the newly renamed On-Line Technologies, a leading provider of advanced, business-to-consumer *Order Management Solutions*, today unveiled its new name and market-facing strategy.

At the Response Expo in San Diego, Sotero Giftos, President of OrderLogix, said, “After detailed assessment of our products, services and markets – a process that also included extensive quantitative and qualitative research with customers and prospects – the launch of the OrderLogix brand and unveiling of our new website are the initial steps in the implementation of the strategic plan that resulted from that effort.”

“We’re very excited to announce the expansion of the company beyond our direct response industry roots, to include e-commerce and multichannel retail sectors. Our *best-of-breed* order management system has been steadily developed and refined over the last 13 years – it’s a solid, reliable and market-leading application that provides marketers with a robust, scalable, pay as you go platform. We are providing marketers with a suite of sales tools that are second to none – to help them increase average order value, optimize sales conversions, manage continuity, and build customer loyalty,” continued Giftos.

The OrderLogix system is a comprehensive order management platform that is compatible with most major ERP and accounting software. For small to mid size marketers it can also be easily integrated with call centers, fulfillment centers, shopping carts, websites, and even Interactive Voice Response (IVR) providers. Jay Gowell, Executive VP added, “In addition to automating order processing, and unlike virtually any other order management solution on the market, the OrderLogix solution is available with a powerful suite of call center tools and applications – built and supported by OrderLogix – that allows the marketer to operate and manage an in-house call center, for a fraction of the cost of competitive solutions.”

The OrderLogix platform is also highly scalable and portable. Because it can be implemented as a hosted SaaS platform, small and emerging marketers can implement the system very cost effectively.

According to Bill Southwick, VP Sales & Marketing at OrderLogix, “Implementation of an OrderLogix platform does not require an extensive capital investment. It can be operational in a matter of weeks, and is rapidly scalable to meet the needs of ultra-high growth marketers – an occurrence that is not uncommon in the direct response industry.” He added, “Our platform provides marketers control over their own data, and the ability to manage multiple service providers simultaneously – a very powerful combination.”

{continued}

FOR IMMEDIATE RELEASE

Contact: Lynn Crothers  
Perry & Banks  
207.761.5957 x321  
lcrothers@perrybanks.com



## About OrderLogix™ ([www.orderlogix.com](http://www.orderlogix.com))

OrderLogix™ is a leading provider of advanced, business-to-consumer *Order Management Solutions* to the direct response, e-commerce and multi-channel retail markets. Based in Portland, Maine the company provides best of breed software that can be easily integrated with most major ERP and accounting applications. OrderLogix delivers a complete suite of implementation and professional services, integrating with marketing data sources, call centers, and other back end service providers. For over 13 years, the people at OrderLogix have become widely regarded for their leading edge software applications, data collection platform, sales conversion tools, channel analytics and integration expertise. OrderLogix clients typically achieve greater visibility and insight into their marketing and sales channel performance, improved operational efficiencies and increases in revenue.

To learn more about OrderLogix visit [www.OrderLogix.com](http://www.OrderLogix.com)

###

FOR IMMEDIATE RELEASE

Contact: Lynn Crothers  
Perry & Banks  
207.761.5957 x321  
lcrothers@perrybanks.com



## OrderLogix™ Announces v3.0 Software Release and Infrastructure Upgrade

*Major Release Provides Latest Productivity Enhancements  
and Platform Upgrades for Performance, Reliability and Redundancy,  
and PCI Level-1 Service Provider Compliance*

**San Diego, California – May 11, 2010** – OrderLogix™, a leading provider of advanced, business-to-consumer *Order Management Solutions*, today announced the release v3.0 of its flagship Order Management application. This major release expands features and performance of OrderLogix's *Commerce Edition* and *Call Center Edition*.

The formal announcement made today at the Response Expo in San Diego delivers major new enhancements to OrderLogix clients in the areas of call center employee wage and commission incentive tracking, call center agent Q/A features, expanded survey deployment tools, database management tools, new tools for task automation, coupon redemption, and the ability to track and manage multiple addresses for a single customer.

In addition to the key features added into this latest major software product release, OrderLogix has also completed a major upgrade to its physical infrastructure, overall capacity and data encryption methodologies. According to Sotero Giftos, President of OrderLogix, "We are not only delivering a number of major new features with this release, but have simultaneously completed a major upgrade to our infrastructure and applications that will provide our customers with the latest in reliability and redundancy, plus core enhancements to meet the strictest, PCI Level 1 Service Provider standards – which are designed to prevent identity theft and ensure data integrity."

### About OrderLogix™ ([www.orderlogix.com](http://www.orderlogix.com))

OrderLogix™ is a leading provider of advanced, business-to-consumer *Order Management Solutions* to the direct response, e-commerce and multi-channel retail markets. Based in Portland, Maine the company provides best of breed software that can be easily integrated with most major ERP and accounting applications. OrderLogix delivers a complete suite of implementation and professional services, integrating with marketing data sources, call centers, and other back end service providers. For over 13 years, the people at OrderLogix have become widely regarded for their leading edge software applications, data collection platform, sales conversion tools, channel analytics and integration expertise. OrderLogix clients typically achieve greater visibility and insight into their marketing and sales channel performance, improved operational efficiencies and increases in revenue.

### About PCI Security

To learn more about PCI Security visit <http://www.pcicomplianceguide.org>

## Press Contact Info

### Address

OrderLogix  
P.O. Box 6798  
Scarborough, Maine 04070-6798

**Main Phone:** 207.396.5172

**Web address:** [www.OrderLogix.com](http://www.OrderLogix.com)

### Press Contact Information

Please direct all press inquiries to:

#### Lynn Crothers

Perry & Banks  
(p) 207.761.5957 x321  
(f) 207.761.4459  
(e) [lcrothers@perrybanks.com](mailto:lcrothers@perrybanks.com)

#### Bill Southwick

Vice President Sales & Marketing  
(p) 207.396.5172 x3011  
(f) 207.396.5351  
(e) [bsouthwick@orderlogix.com](mailto:bsouthwick@orderlogix.com)



# OrderLogix™

Greater Insight.  
Complete Control.

PO Box 6798, Scarborough ME 04070-6798  
1.888.280.3303