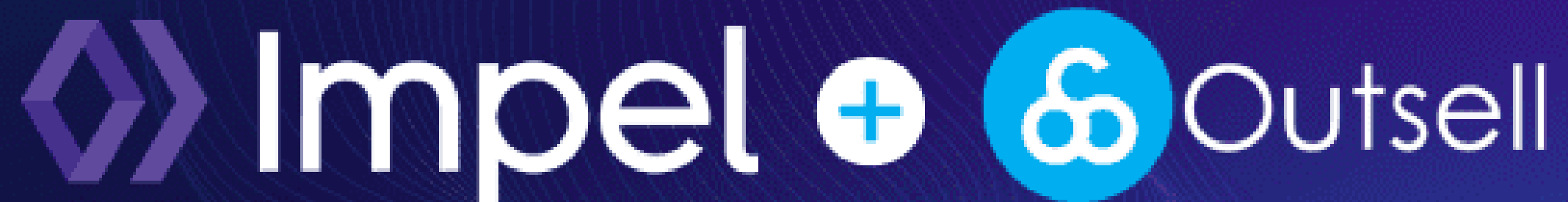


# STRATEGIC ACCOUNT PLANNING



# AGENDA

- Client Overview
  - Product Overview
  - SWOT Analysis
  - Current Rev and KPIs
- Key Players
- Action Document
- Competitive Landscape & Footprint
- Decision Making
- Account Strategy
- Opportunity Summary

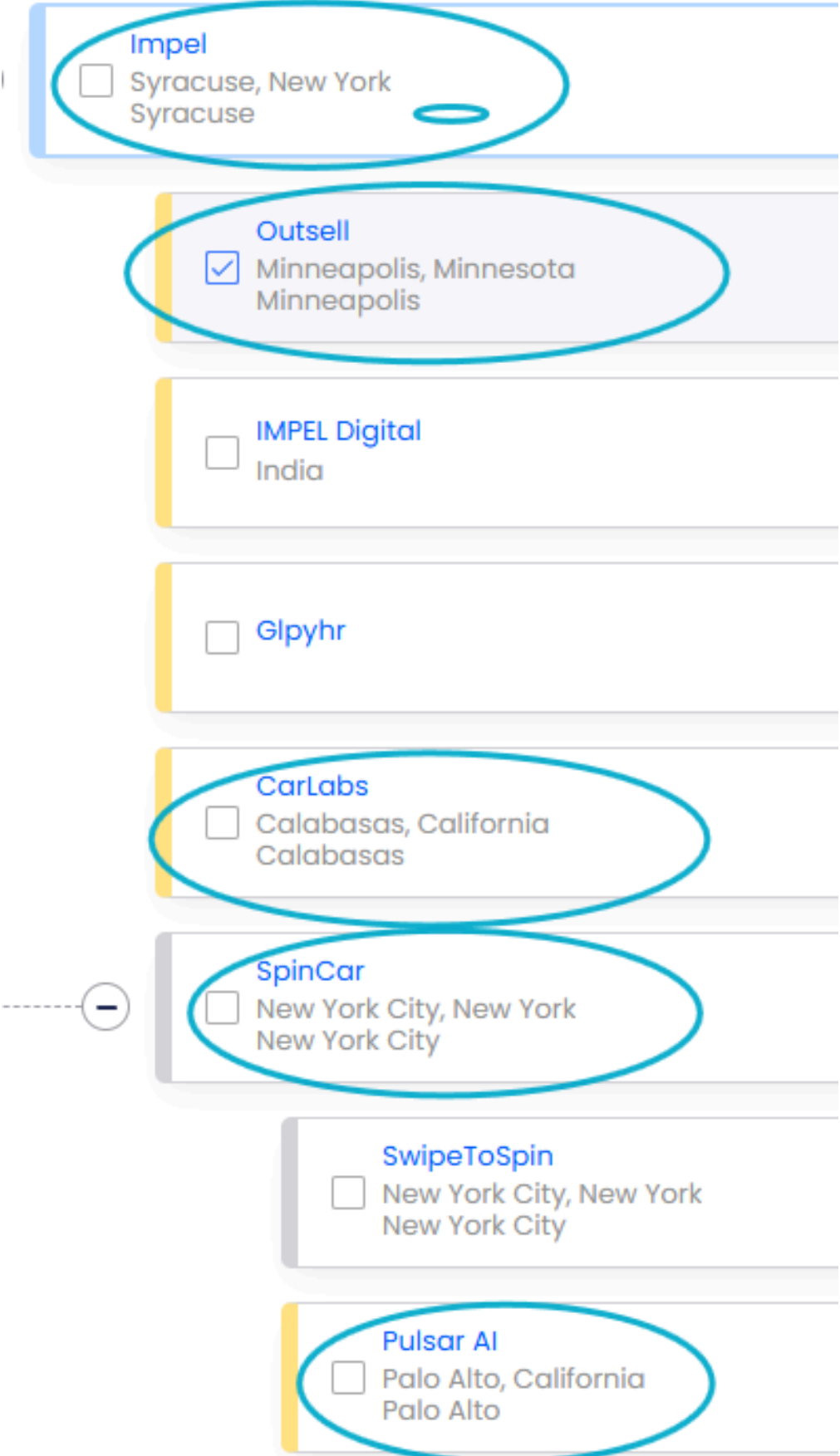
## Q1 STRATEGIC ACCOUNT PLANNING

# CLIENT OVERVIEW

Impel has acquired numerous companies over the years – most recently Outsell for 100M. Both companies are acting as separate entities today as our partners on DealerVault – just as we have done with Pulsar, SpinCar and Carlabs in the past.

Impel – Digital Engagement platform. End-to-end omnichannel solution leverages proprietary shopper behavioural data and AI technology to deliver hyper-personalized experiences at every touchpoint across the entire customer journey.

Outsell – Marketing platform that uses AI with data received to help dealerships on the DI platform understand where the customer is in their buying status. Dealers can engage with customers on social media and email marketing within the platform. All customizable for the Dealerships.



The screenshot shows a list of client entries in a table-like format. Each entry consists of a company name, a checkbox, and a location. The entries are: Impel (Syracuse, New York / Syracuse), Outsell (Minneapolis, Minnesota / Minneapolis), IMPEL Digital (India), Glypyhr, CarLabs (Calabasas, California / Calabasas), SpinCar (New York City, New York / New York City), SwipeToSpin (New York City, New York / New York City), and Pulsar AI (Palo Alto, California / Palo Alto). The entries for Impel, Outsell, CarLabs, SpinCar, and Pulsar AI are circled in blue. A minus sign icon is visible to the left of the SpinCar entry.

Company	Location 1	Location 2
Impel	<input type="checkbox"/> Syracuse, New York	Syracuse
Outsell	<input checked="" type="checkbox"/> Minneapolis, Minnesota	Minneapolis
IMPEL Digital	<input type="checkbox"/> India	
Glypyhr	<input type="checkbox"/>	
CarLabs	<input type="checkbox"/> Calabasas, California	Calabasas
SpinCar	<input type="checkbox"/> New York City, New York	New York City
SwipeToSpin	<input type="checkbox"/> New York City, New York	New York City
Pulsar AI	<input type="checkbox"/> Palo Alto, California	Palo Alto

# CLIENT OVERVIEW

## In the News

- Impel and FordDirect Partner to Bring Industry-Leading Conversational AI Solutions to Ford Dealers and Lincoln Retailers
- Impel Strengthens C-Suite, Adding Veteran Auto Tech Execs as CTO and CPO, and Creating 3 New Executive Positions Amid Aggressive Global Expansion

- 

## Corporate Goals & Objectives

## Strategic initiatives

Tekion Integrations  
Move all Outsell Dealers to Impel

# CLIENT OVERVIEW

## Competitors

- Client Command
- 3 Birds Marketing – which was aquire by DAS Tech in 2023

## Decision Making Process

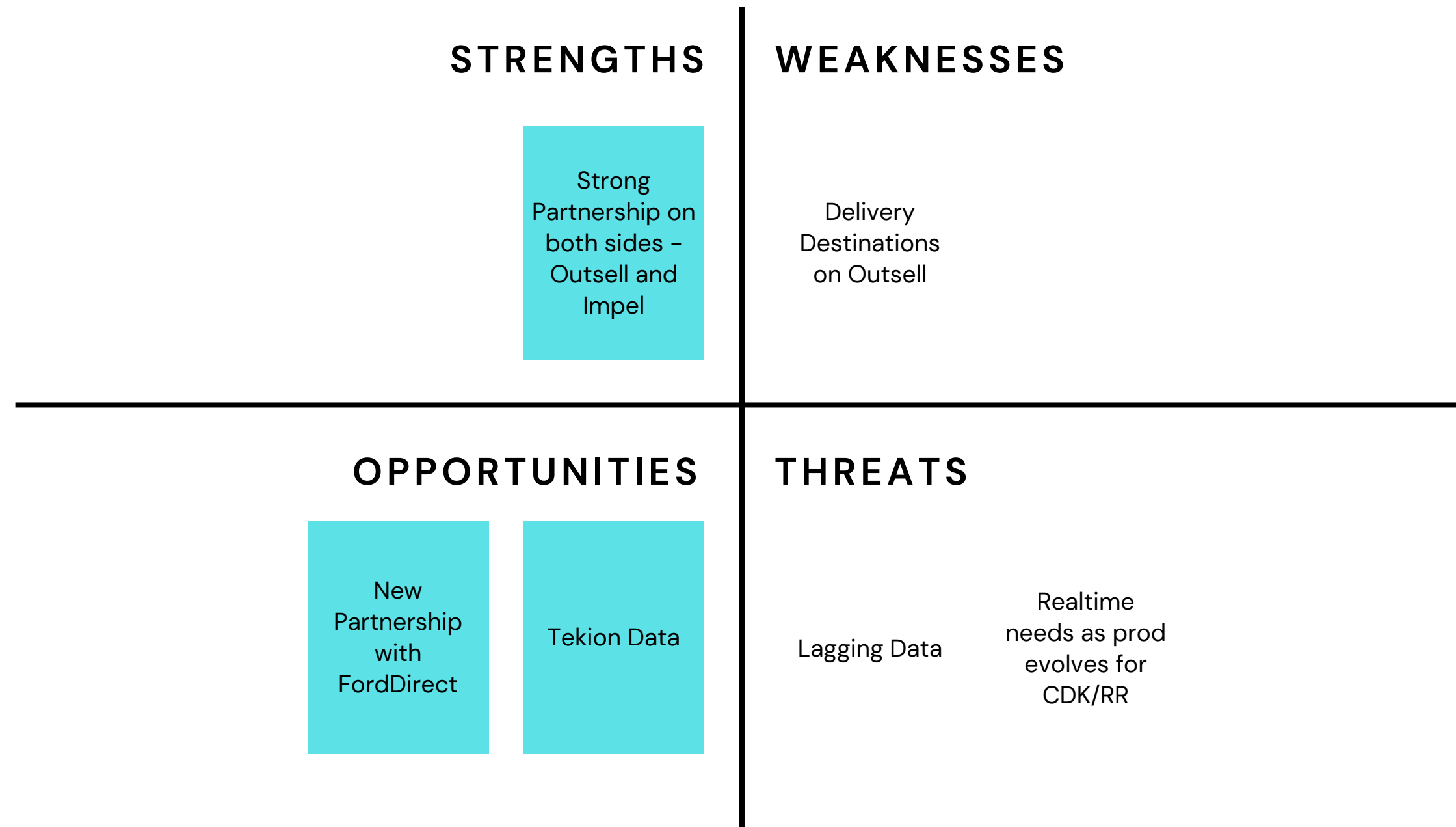
## Strategic Partners

FordDirect

# EXISTING INTEGRATIONS



# SWOT ANALYSIS

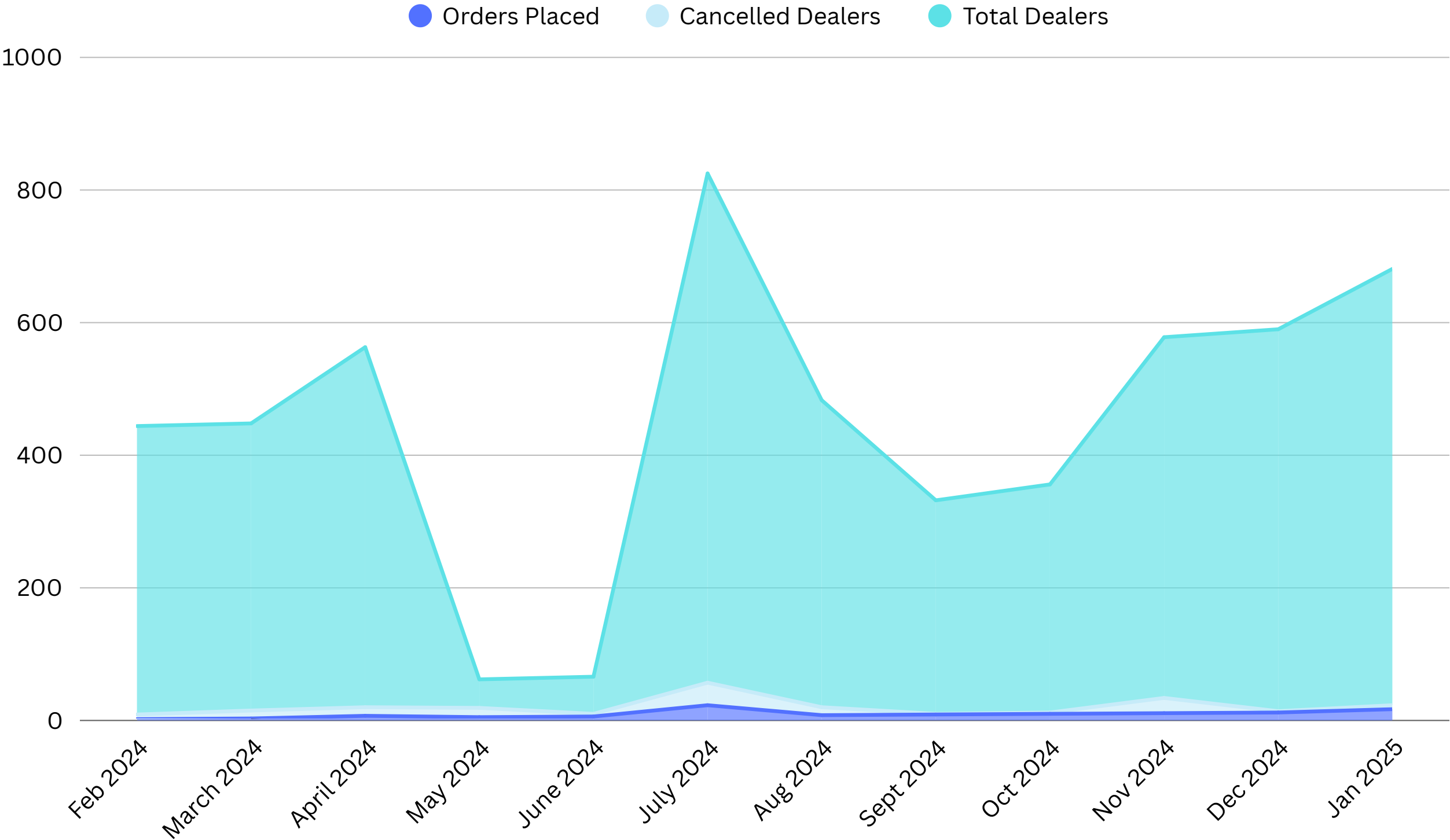


# Order History

Orders Placed  
12

Cancelled Dealers  
23

Total Dealers  
670





# DEALER BREAKDOWN

Total Number of Dealers Outsell = 602  
Total Number of Dealers Impal = 56  
Total Dealers = 658

Program Name	Number of Dealers
Impel	56
Impel – Old	0

Program Name	Number of Dealers
DSplus	48
DSplus for Lexus	3
DSplus Lease Retention	3
DTG Octane	306
Outsell	191
Outsell Data	23
Outsell for Subaru	4
SETONEVOICE	24
Outsell LLC	0
Lonewolf Inventory Listings	0

# Key Performance Indicators

01

Order Complete %

Briefly elaborate on what you want to discuss.

02

Add a KPI

Briefly elaborate on what you want to discuss.

03

Add a KPI

Briefly elaborate on what you want to discuss.

# Key Players

## Role Descriptions

- Economic Buyer: Has the final “Yes” and access to discretionary funding
- Technical Buyer: Responsible for defining the technical decision criteria
- Champion: Has power and influence within the account and actively sells on your behalf
- Coach: Provides information but has limited power and influence
- Influencer: Influences but cannot make the final decision
- 3rd Party: Outside individual who has influence over the decision criteria/process

## Relationship Status

- Green = Advocate
- Red = Hostile
- Yellow = Neutral
- White = No Relationship



**Devin Daly**

Chief Executive Officer  
& Co-Founder  
Economic Buyer



**Eric Portman**

Chief Technology Officer  
Technical Buyer



**Andrew Lumsden**

Sr. VP of Platform Services  
Economic Buyer & Champion



**John Clavadetscher**

Chief Commerical Officer, Prev  
Outsell President  
Coach



**Matthew Muilenburg**

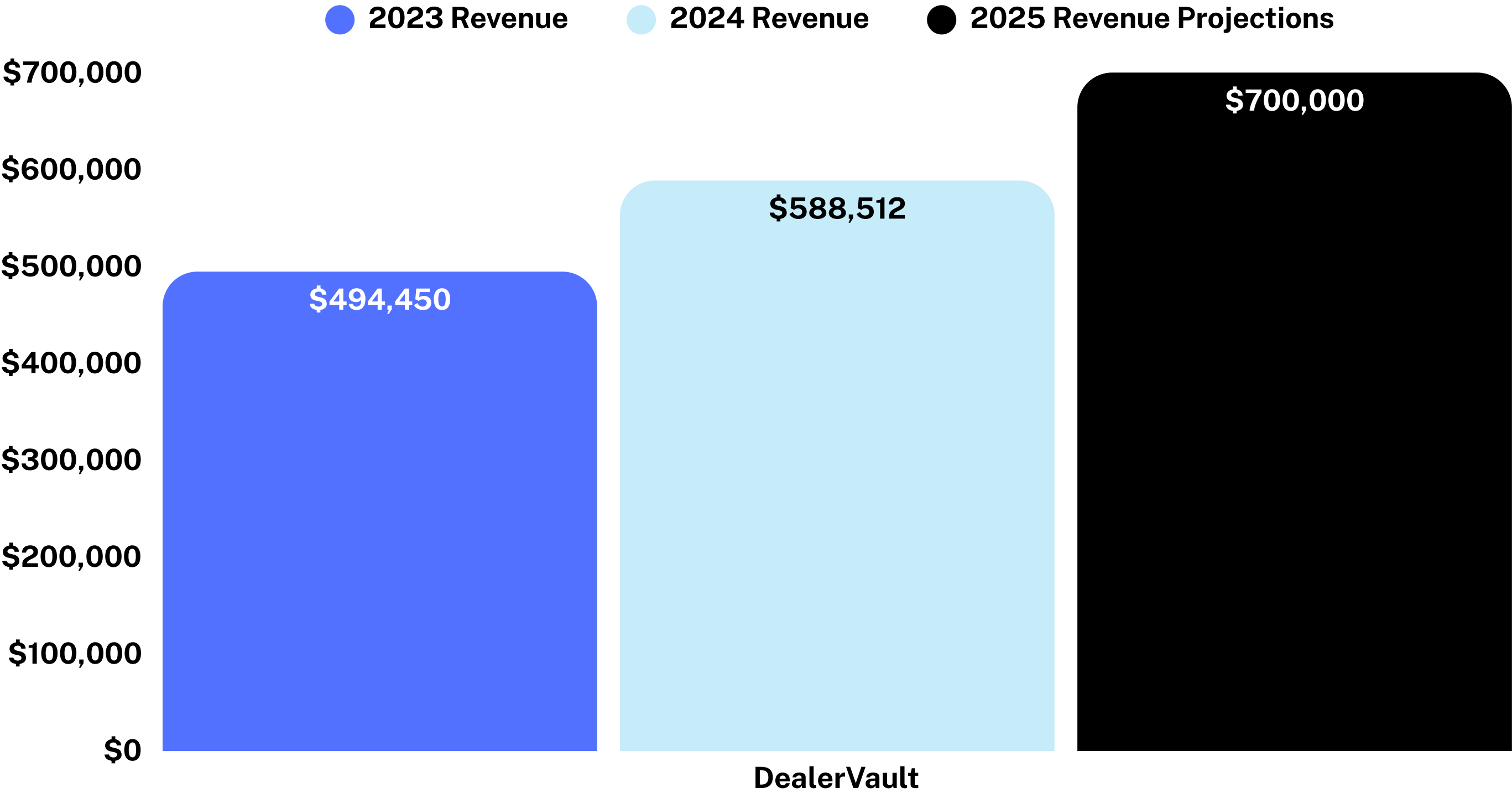
Chief Product Officer  
Technical Buyer



**Steve Saporta**

Chief Information  
Security Officer  
Champion

# CLIENT REVENUE



# ACCOUNT STRATEGY

Key Activities	Desired Outcomes	Due Date	Status
40 dealers they need to get Tekion historical and monthly polling added by EOMarch	All dealers live in March/April at the latest for Tekion data feeds	03/31/2025	In Flight
Move all Outsell dealers to the Impel Account	Streamline data processes internally for dealerships to leverage the Service AI. They also need to get more data feeds setup to complete this and restructure their internal data "layers" and storage.	12/31/2025	Ongoing

# OPPORTUNITY #1



Revenue: 2000 in additional MRR  
Close Date: 04/31/2025  
SF Link: NA- Account Growth

INITIATIVE	DESCRIPTION	REQUIREMENTS	CRITICAL NEXT STEPS	ECONOMIC BUYER	CHAMPION
Tekion Data	40 dealers added to the account	Ongoing	Bulk Order Placed	Andy	Andy

# OPPORTUNITY #2



Revenue:  
Close Date:  
SF Link:

INITIATIVE	DESCRIPTION	REQUIREMENTS	CRITICAL NEXT STEPS	CHAMPION
FordDirect Dealers Added	Impel recently launched a partnership with FordDirect in Jan 2025 – all these dealers will need to come through DV.			

# OTHER INITIATIVES

INITIATIVE	DESCRIPTION	TIMELINE
Training for new members of the team	Andy said Christine is still POC for data feeds, but he would like us to train a couple other people on the team on how to manage the Outsell/Impel accounts since the restructure	March 2025 & Ongoing



TARGETED GOALS	START DATE	END DATE	STATUS
Regular Check-ins	Feb 19 2025	Ongoing	In Progress
Tekion Bulk Order Submitted	March 20 2025	March 20, 2025	On hold