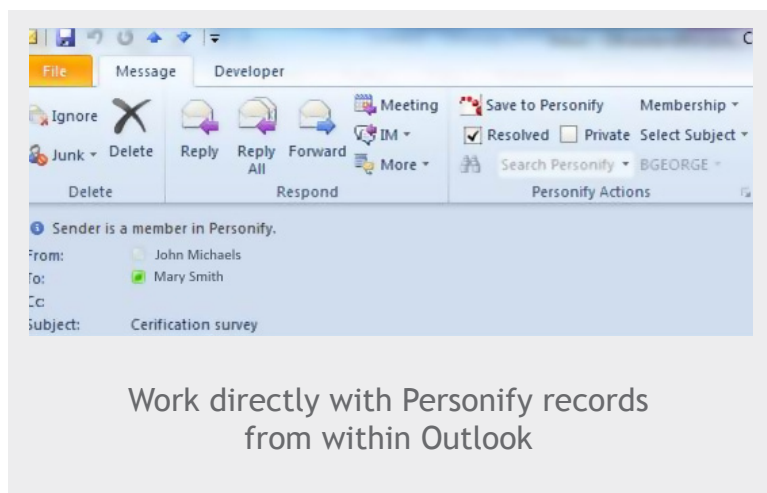


## Personify Outlook 2010 Plugin

The Personify Outlook 2010 Plugin helps organizations consolidate the history of electronic correspondence to build a strong, unified history of all customer interactions. For most organizations, e-mail is the system of choice for ongoing communications and collaboration with members and volunteers. Still others use e-mail for fundraising and business development opportunities. To help organizations more effectively communicate with their constituents, donors and business partners, and keep track of those activities, Personify has an integrated plugin for Outlook 2010.

Personify's Outlook 2010 plugin conforms to the way your organization works, allowing staff to engage with their constituents in the familiar Outlook environment. You can allow any staff member to access and use Personify customer data directly from Outlook, even if they don't routinely log into Personify. Personify's Outlook integration helps organizations effectively manage their relationships by allowing staff to seamlessly access Personify data for Outlook e-mails, appointments and tasks.

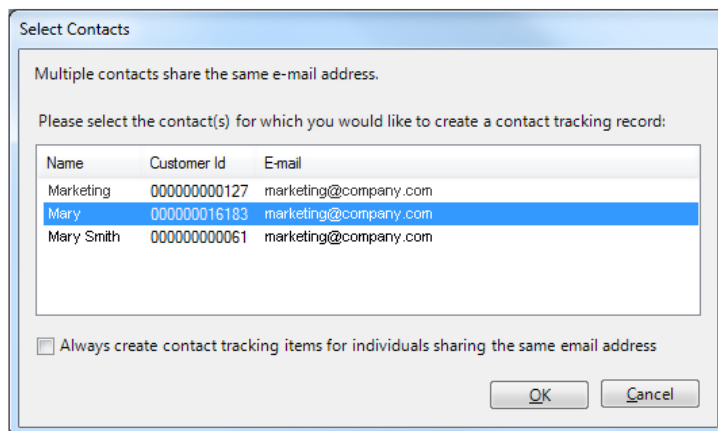


From Outlook staff can:

- Search Personify for customers directly from Outlook
- Create activities records for e-mail messages sent directly to customers
- Schedule a meeting or appointment with one or multiple customers
- Create follow-up tasks regarding and assign them to other staff and have them recorded in Personify
- Save Outlook activities as a Personify contact tracking record including both incoming and outgoing communications

## Streamline Communicating with Constituents

With an easy-to-use Microsoft Outlook integration, staff can correspond with members, constituents and business contacts without disrupting their natural workflow. From Outlook, you can quickly search and retrieve any Personify customer including individuals, companies, organizations, or committees. Users can retrieve all members associated with any organization such as committee members or employees of a company. Personify's Outlook integration provides staff with the flexibility to work the way they want to - allowing staff to service members efficiently from the familiar Outlook interface, while drawing from and continuing to update the organization's membership database via Personify. When staff receive new e-mails in their inbox, they can see at a glance information about the sender via a direct link to Personify, such as whether they are a member, VIP, or other configurable information based on the organization's needs.



## Build a Complete Member History

Implementing a bi-directional integration between Personify and Outlook allows staff to selectively save and share customer Outlook e-mails, appointments, and tasks (including attachments) as activity records in Personify Contact Tracking. Critical Outlook correspondence previously stored disparately across staff PCs are now visible enterprise-wide. With one click, you can share any Outlook correspondence with the entire organization - helping serve members more efficiently and intelligently.

## GETTING STARTED

To learn more about the Personify Outlook 2010 plug-in or get a demonstration, contact your Project Manager.

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*TMA Resources Inc.: Headquartered in Vienna, Va., TMA Resources and its team of highly skilled professionals produce member relationship software solutions. Clients include many of the most prestigious professional societies, trade associations, labor unions and other member-centric organizations in the United States and overseas. TMA Resources was named No. 303 on the 2009 Software 500 listing and is listed as one of the largest technology employers in the Washington, D.C., metropolitan area by the Washington Business Journal. For more information about the company, visit [www.tmaresources.com](http://www.tmaresources.com).*