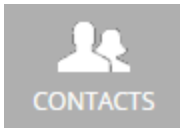
Welcome to Reachable! Getting started is a simple process that integrates easily with your current contact system and CRM. We take your virtual Rolodex and use it to find the easiest path to the clients you don't have – yet.

Getting Started

Setting up your Profile: When you sign up either from the website or from an invitation, you will be asked to provide your email, your first and last name, and a list of companies where you have been employed. We cross-reference that information with a database of public information to complete your profile in the Reachable system. If any of your information changes, email us at support@reachable.com and we'll get it updated for you quickly.



Uploading your Contacts: Now it's time to upload your contacts. There are multiple sources for these, and you are able to use any and all of them. Be aware that the Reachable platform requires at least a first name, last name, and email address in any given record so that it can create a contact in the system. If any of your contacts do not have these three items, they will not be populated into the Reachable platform.

- **Facebook**
  Importing your Facebook contacts will generate a small login window for Facebook and may also require you to provide a secondary security login, often as a code generated by your smartphone.

- **Gmail**
  Importing your Gmail account opens a login window to select the Google account you'd like to import. If you have more than one Google account that you'd like to use in the Reachable platform, click on your email address in the upper right hand corner in the Gmail dialogue and click on "Add account". Log into that account to complete the import. If you have 2-step Verification enabled, you will need an additional code from your Google Authenticator.

- **Outlook**
  We designed a fantastic little automated program that you can download into your computer, and it will import your contacts automatically every time you run it. Alternately, you can also export your Outlook contacts into a .CSV (comma separated

values) file from by going to File --> Options --> Advanced --> Export, which will open the Import/Export wizard. Under "Create a file of type", select .CSV, choose your location to save it, and then click on "Okay". More complete instructions are available from Microsoft, here. To import that file into Reachable from the Outlook dialogue, click on "Browse to file", select the .CSV you just saved, and click on Open.

- **LinkedIn**
  From your Refresh popup, you can follow this link to go directly to the export page in LinkedIn. (You may have to log into LinkedIn if you are not already.) Make a note of where the download is saved, click on "Browse for file", and select the .CSV file to upload it.

Using a different contact management program? Most (if not all) will allow you to export your contacts into a .CSV. If you have any questions or you need help creating your files, don't hesitate to email us.

At this point, take a little time to remove duplicates, non-business contacts, and expired contacts. Click on "Delete Contacts", select the entries you need to delete, and then click on the "Delete" button at the top. Click on "Done" when you're finished with this page.

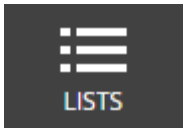
You can set some contacts to "Hidden" using the last column on the right. These are contacts that will not be accessible to your Team, so if they seek a path to one of those private contacts of yours, it will not show up for them. You can easily turn this feature on and off for each one of your contacts. They will, however, show up for you as nodes in paths to your targets.

Make sure to rate your contacts using the "Rating" column to identify how close you are to them in real life. Contacts with more stars will have more "weight" in your paths, improving the quality of your paths. Likewise, contacts with fewer or no stars won't show up quite as much.

If you were invited to Reachable through an enterprise or invitation, then you already have a group of users that you are connected with. Your Team members make up the next full layer of your contacts and paths, and the more members you have, the wider your potential circle of targets.

Selecting your first lists. Finally, you will be brought to the Lists page, where you can select your first complementary Leads Market list. This will be added to your "My List of Leads" page.

Lists Page



Under "Lists", you'll see two options - one for "My Lists of Leads" and the other for "Leads Market".

"My Lists of Leads" are the to-do lists you create from your searches or by uploading a .csv file of your intended prospects. When you run a search on a person or company in Reachable, you'll have an option that says, "Save as a Lead". If you click on this button from a page that has multiple results, you will see tick boxes to the left of the results. Use the "Expand Quick Profile" option to make sure you're choosing the correct person or company, put a check in the tick box, and then click on "Add Selection to List". A dialogue box will pop up asking you to add your selections to an existing list or to create a new one. Once you have finished adding everyone from this page, click on "Done" to return to the results.

The Reachable platform monitors your connections to the people or companies that are on your lists. When your connection to them improves to a score above 70, you will be sent an email alert. Log into Reachable to find out how much closer you are to your prospect.

For any list, you can edit the name of it, write a note to yourself concerning it, or delete it, all directly from the main Lists page. You can turn on and off alerts for any list by clicking on the red flag in the far right column.

There is also a collection of "Leads Markets". Subscribe to any of these lists to get industry-curated directories of individuals and companies. Use this information to expand your prospects by adding them to your personal lists and monitoring your connection to them. Once you've subscribed to a list, it's loaded into your "My Lists of Leads" view, and you can add people or companies to the lists as you wish; they become additional entries. Just as with any other entry in your lists, an alert is generated when your connection to a prospect improves and you'll receive an email if your path strength to a prospect rises above 70.

You can easily filter between your lists of people and your lists of companies with the checkmarks on the left. You can also sort your lists by name, number of entries, which ones have notes (under the Actions column), and number of alerts.

Team page

The people listed on the Team page are your closest connections, and they will have the strongest weight in creating your paths. As more people join your team, your potential connections to your prospects grow – as, too, their connections through you.

When you click on "Invite New Members", a popup will appear. Copy and paste the text in that window into an email to send. The hyperlink contains a special code that will link your invitation to your existing team automatically. Once your associate clicks on the link, completes their profile, uploads some contacts, and selects a starter list, they will appear in the roster of your Team page.

The statistics on the left indicate the strength of your team in total numbers of contacts and companies you cumulatively have together. You can sort the lists of team members using the "Name", "Contacts", and "OK to Network" column headers.

Opting Out

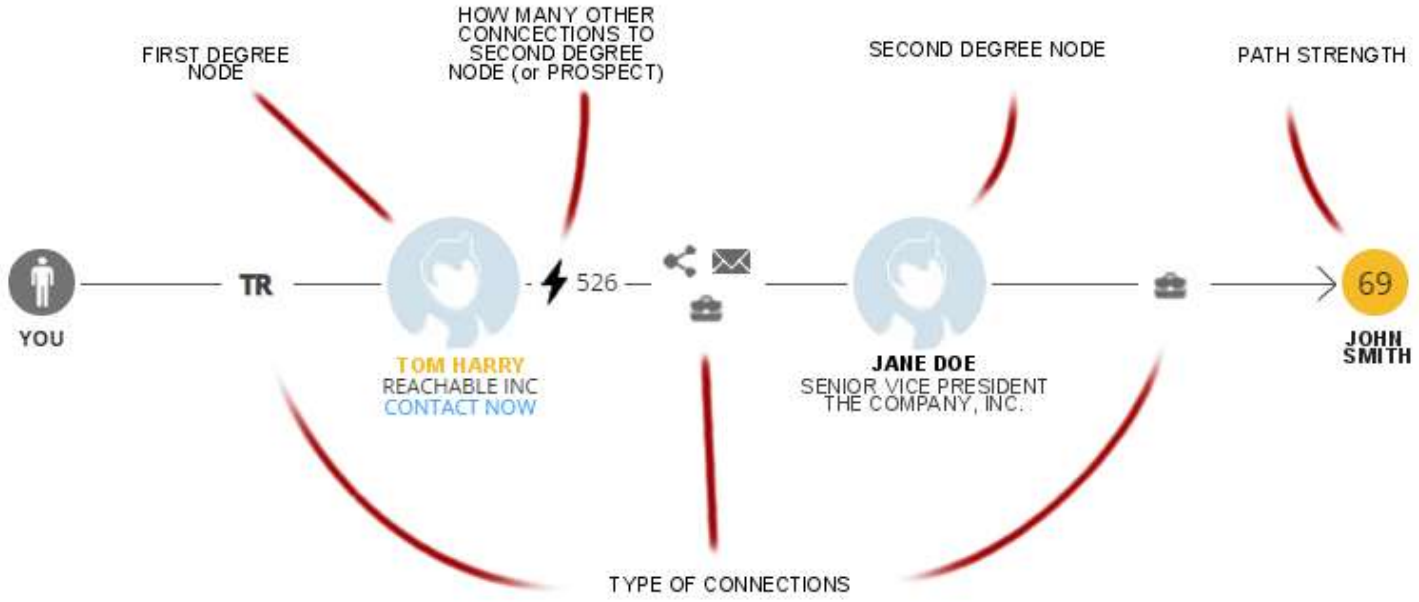
When you opt out of your Team connections through your profile settings page, it means that you and your contacts will no longer be available as nodes in your Team's path results. You might want to use this feature if you're going to be away for an extended period of time.

Paths Results

Run a search on a person or company, click on the profile that matches the prospect, and you will see the path of how to reach that person or company. You can filter your results to see only those paths through your Team or only those paths that include Senior Management people with the check boxes on the left.

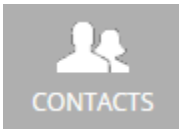
Paths can have one or two nodes to get to a prospect. The icon legend here indicates how you are connected to each of the people on your node, and how the people on your node are connected to your ultimate prospect.

This is what your results will look like:



If you are ready to request an introduction, click on the "Contact Now" feature under your first degree node. A pop-up window will appear with their contact information. Clicking in this window will activate your native email program.

Contacts



Refresh your Contacts frequently by clicking on "Refresh Contacts" and selecting your source. As your contact list grows, so do your connections. It may take a few minutes for all of your contacts to be integrated into the platform.

You can filter your list using the "Unrated" and the "Hidden" features on the left.

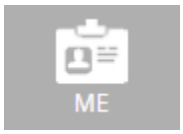
Rating a contact using the 5-star system allows you to put more significance on the people with whom you are closer, so paths that they appear in will have a higher path strength. The five levels of rating how well you know a contact are "Hardly Know", "Know a Little", "Know Somewhat", "Know Well", and "Know Very Well". Under the "Source" column, there is also a small letter R icon next to contacts that you have rated. Once you have rated a contact, they stay rated, even if that rating is "Hardly Know".

You can set a contact to "Hidden" as well, which allows them to show up in only your paths – your Team members will not be able to see them as part of their paths if the contact comes through you. Setting a contact to "Hidden" only applies to paths that go through you, though: if someone else knows the same person, that person will still show up in their own paths.

You can sort your contacts by name or by company by clicking on the column headings.

The Source column shows from which sources your contacts are gleaned (Facebook, Outlook, LinkedIn, Gmail, a .CSV file, and/or your rating). Many will have more than one icon, which indicates that the Reachable platform matched the first name, last name, and company name into a single record. Some de-duplication happens this way, but if the records are not a perfect match, you may end up with some duplicates.

Me: Your Profile Page



Your profile page displays information based on what you entered during your setup process. Your information was compared against our databases and those sources are displayed on your profile's front page.

"My Data Sources" indicate which channels you've used to import contacts, and it also displays which external sources Reachable displays about you, such as general web data, a profile from Capital IQ, or other databases.

Under "Settings", you can change your password, opt in or out of being included in your Team's paths, and set your email preferences. Digests are weekly emails that you'll receive on Tuesdays that provide a basic overview of the previous week's activities. Alerts refer to the emails that you'll receive when your path strength to a prospect on your Lists rises above 70.

Privacy Policy

Reachable will never contact your contacts.

Reachable will never share your contacts' email addresses or phone numbers with anyone.

Reachable will share your profile, email address, and whether or not you are connected to any person or company, only with your Team.

You can selectively hide connections from your Reachable Team or delete contacts entirely.

You can opt out of your Reachable Team any time.

You data always remains yours, not your employer's.

Reachable does not share one client's data with other clients, and does not operate as an exchange where user data is contributed for the benefit of all Reachable's clients. We do not provide access or sell user data to recruiters or advertisers. We do not track users' email communications.

Frequently Asked Questions

Why isn't someone showing up as a closer connection on my paths when I know them personally? A common factor is which filters are activated when you run a query. You can look at all of your connections at once, filter the results to see only the ones that include your Team members, or even only see paths that include senior management level nodes.

How do I change my contact and personal information?

> Email us at support@reachable.com with any updates to your contact email, name, or companies, and we'll get that updated for you.

Who can see my contacts' information?

> You! No one else can! One of the strengths of the Reachable platform is that, while we find the paths to get you to your intended target as efficiently as possible – and with the greatest amount of relationship capital – the option to assist with a path is voluntary. You have to connect with

the nodes on the path yourself through our automated system, and they elect whether or not to assist you.

What happens if I leave the company I was with when I joined Reachable?

Our core principle is that your data is your data. We do not connect directly to your CRM or anything else. If your contact information is going to change, send a request to support@reachable.com, and we'll get everything updated for you. Your contacts will remain yours and will not be accessible to your company or your Team members.

Why doesn't my number of contacts in Reachable match the number of contacts from my other sources?

It's possible that some of your original records are incomplete, and the Reachable platform does not have enough information to match it with our other data sources. This does not affect your use of the platform in any way. When you update your contacts in your other data sources such as LinkedIn or Gmail, they will show up here in Reachable when you refresh them. Remember that you need at least a first name, last name, and email address for our platform to be able to use the information.

Did you know we have a Chrome extension?

When you have the extension installed, from any page on the internet, click on the Reachable con in the upper right hand corner, and type in the name and keyword for a person you'd like to reach. You'll get the same search results that you do on our main page in the plugin window, without leaving the page you're already on. It's a great way to engage in your market research without missing a beat. If you access it directly from a profile page on LinkedIn or another social media site, the plugin will automatically make paths to the person you're viewing.[/expand]