MOVE

Templates and tools from the MOVE book to get unstuck and level-up your organization
The 3Ps of GTM

Business Transformation
The Three Stages and the 3Ps of GTM Business Transformation
The Three Stages and the 3Ps of GTM Business Transformation
MOVE Framework
4 Question Go-to-market Framework

With these four questions, you’ll know everything you need to know to take your next big step.
## BUSINESS STAGE & THE 3Ps

### GTM FOCUS & THE TEAM

#### 1. Market (who)
Who should we market to?

- **TAM**
  - Broad - minimal prioritization

#### 2. Operations (what)
What do you need to operate effectively?

- **Ad-hoc**
  - Department level data and decision making authority

- **Aligned**
  - Shared understanding of the data and aligned decision making across sales & marketing with dedicated ops for each department

#### 3. Velocity (when)
When can we scale our business?

- **Reactive**
  - When there’s a fire, hire someone to put it out

- **Proactive**
  - Invest now to prevent future fires

- **Prioritized**
  - Invest for growth not for pain

#### 4. Expansion (where)
Where can we grow the most?

- **Single threaded expansion**
  - One distribution path (direct, channel or partner)

- **Partial expansion**
  - Multiple distribution paths and coverage areas (GEO’s, Verticals)

- **Full expansion**
  - Distribution + Coverage + Multiple products, platform, & ecosystem

### KPI’S

- **Metrics by functions**
  - Funnel Conv rates, CPL, Bookings & Win rate
  - Sales activities (calls, demo’s, ops)
  - Marketing activities (traffic, leads)

- **Metrics by account segments**
  - Engagement
  - Pipeline coverage
  - Deal velocity
  - Average deal size, GRR
  - Efficiency metrics (magic number, CAC)

- **Metrics by customer cohorts**
  - CLV, Time to value, NPS, Customer ROI
  - Product line revenue & Pipeline
  - NRR / Net Expansion
  - Gross Margins
  - Growth by category

### BUSINESS OUTCOMES

- **Inefficient growth**
- **Efficient growth**
- **Efficient growth at scale**
Take the GTM assessment at themovebook.com and identify where you are on the GTM maturity curve vs where you should be.

Then follow these 5 Steps to GTM Business Transformation!
1) Identify your current business stage.
2) Align to your current GTM focus.
3) Answer the four-question framework to establish your GTM process.
4) Run your business off the KPIs.
5) Last, test your business outcomes.

If there’s no growth, identify if it is a three Ps problem or a GTM process problem, and invest accordingly. Use the bulleted list under the heading “From Ideation to Transition” in Section Two of the MOVE book for things that might be preventing you from transitioning to the next stage. Once you’re ready for the next stage, transform your GTM process by repeating these steps again.

<table>
<thead>
<tr>
<th>Business Stage &amp; the 3Ps</th>
<th>Ideation</th>
<th>Transition</th>
<th>Execution</th>
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</thead>
<tbody>
<tr>
<td>GTM Focus &amp; the team</td>
<td>Problem-market fit</td>
<td>Product-market fit</td>
<td>Platform-market fit</td>
</tr>
<tr>
<td>Who should we market to?</td>
<td>TAM: Broad - minimal prioritization</td>
<td>Segments: Relevant accounts (TRM + ICP + Intent)</td>
<td>Cohorts: Customer cohorts + Relevant new accounts</td>
</tr>
<tr>
<td>2. Operations (what)</td>
<td>Ad-hoc: Department level data and decision making authority</td>
<td>Aligned: Shared understanding of the data and aligned decision making across sales &amp; marketing with dedicated ops for each department</td>
<td>RevOps: Coordinated decision making a cross GTM teams aligned to achieve company objectives led by centralized rev ops team using shared systems, data, processes and GTM scorecard</td>
</tr>
<tr>
<td>What do you need to operate effectively?</td>
<td></td>
<td></td>
<td></td>
</tr>
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<td>Where can we grow the most?</td>
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<td>KPI’s</td>
<td>Metrics by functions</td>
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<td></td>
<td>Funnel Conv rates, CPL</td>
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<td>Pipeline coverage</td>
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<td>Sales activities (calls, demo’s, ops)</td>
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<td></td>
<td>Efficiency metrics (magic number, CAC)</td>
<td>Growth by category</td>
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</tr>
<tr>
<td>Business Outcomes</td>
<td>Inefficient growth</td>
<td>Efficient growth</td>
<td>Efficient growth at scale</td>
</tr>
</tbody>
</table>
Work through the questions in the MOVE framework as a GTM Team

MOVE will transform your teams into a well-oiled machine, where all gears turn together to keep your company moving forward in a beautiful way: growing, scaling, and expanding.

1. Whom should we market to?
2. What do we need in order to operate effectively?
3. When can we scale our business?
4. Where can we grow the most?

We can summarize these questions as your market, operations, velocity, and expansion, or MOVE. As it turns out, finding and aligning on the answers to these four questions is a lot more difficult than it seems when you don’t have a clear framework for doing so.

Use the Key Questions Templates for your current business stage to facilitate and align on the answers.
**Ideation Stage** - Problem-Market Fit -MOVE Framework Key Questions Template

These are the questions you need to discuss with your team in order to work through your strategic, alignment, and transformation challenges, using the MOVE framework as a guide to help you clarify your next move.

### Market

**Strategic questions:**
- What problem are you solving?
- How big is your market?
- How are you positioned?

**Alignment questions:**
- Who is your buyer?
- What size of company and verticals are you having the most success with?
- Which territories are you focusing on?
- Which use cases are working the best?

**Transformation questions:**
- What’s stopping you from creating repeatable sales motions?
- What changes in market approach would speed up market adoption?

### Velocity

**Strategic questions:**
- How is your sales force trained and iterating on the product pitch?
- How quickly is your sales team hitting quota, and how quickly is marketing creating more demand?

**Alignment questions:**
- Is there a team dedicated to training sales hires and providing ongoing support?
- How are you tracking and testing ramp ratios for sales ramp to quota, marketing ramp to demand gen, SDR ramp to pipeline, and customer to ROI?

**Transformation questions:**
- What’s stopping you from creating higher velocity in your ramp ratios?
- What would you need to know to hire proactively?

### Operations

**Strategic questions:**
- What KPIs are you looking at to see if there is a problem-market fit?
- How are you incentivizing teams to deliver on these KPIs?

**Alignment questions:**
- What tech is helping each of your GTM teams to deliver business outcomes?
- How do marketing, sales, and finance operations teams align on common definitions and KPIs?

**Transformation questions:**
- What’s stopping you from focusing on your best-fit accounts over lead funnels?
- How quickly can you look at all operational metrics across GTM functions to make business decisions?

### Expansion

**Strategic questions:**
- How are you selling? Direct, channels, partners, agencies?
- What percentage of your revenue is coming from each distribution type?

**Alignment questions:**
- What distribution type should you focus on?
- How quickly can you test new distribution channels?

**Transformation questions:**
- What’s stopping you from going in different industries, verticals, geographies?
- Should you be going upmarket or downmarket?
- How do you increase your average deal size?
Transition Stage - Product-Market Fit - MOVE Framework Key Questions Template

These are the questions you need to discuss with your team in order to work through your strategic, alignment, and transformation challenges, using the MOVE framework as a guide to help you clarify your next move.

**Market**

**Strategic questions:**
- What segments are your best performing and why?
- Can you replicate that success into other segments?
- What new use cases would drive up your deal size?

**Alignment questions:**
- How is your GTM team aligning around segments?
- How do you align your messaging and value proposition for each segment across GTM touchpoints?
- How are you going from TAM to TRM to further prioritize within each segment?

**Transformation questions:**
- How will you achieve top ranking in analysts for your key category?
- What’s stopping you from selling similar solutions to similar buyer for similar problems at scale?

**Operations**

**Strategic questions:**
- What KPIs are you looking at to see if there is a product-market fit?
- How are you adjusting the incentives of leaders and teams to deliver on the new KPIs?

**Alignment questions:**
- How predictable are your conversion metrics?
- How are you balancing the tradeoffs between retention and acquisition?

**Transformation questions:**
- How will you achieve top ranking in analysts for your key category?
- What’s stopping you from creating a single source of truth?
- How are your tools across GTM teams integrated to help you generate better business insights?

**Velocity**

**Strategic questions:**
- What are your highest priority velocity ramps (people and enablement) that need improvement?
- What key leadership hires are needed to add new functions and scale your organization?

**Alignment questions:**
- How are you coordinating training, documentation, kickoffs, and release launch schedules across the GTM team and customers?
- How are you making holistic hiring decisions to support your highest priorities rather than the needs of departments?

**Transformation questions:**
- What’s stopping you from aligning enablement functions across departments?
- What changes do you need to make to deliver a unified experience to your customers?

**Expansion**

**Strategic questions:**
- How quickly can you expand into different industries, verticals, or geographies?
- What new products or services will your existing customers happily pay for to solve their problems?

**Alignment questions:**
- How would your business model shift if you went upmarket or downmarket?
- What makes your product sticky?

**Transformation questions:**
- What’s stopping you from having the biggest deals with your top customers?
- What’s stopping you from adding pro-serves to increase deal size?
- What percentage of your revenue is coming from each coverage area?
**Market**

**Strategic questions:**
- What additional problems could you solve to expand your value for existing customers?
- Which build, buy, or partner approach(es) will ensure you can scale growth?
- Who are your competitors today versus tomorrow, and how will you transition for this?

**Alignment questions:**
- How do you sequence your “land and expand” offering?
- How will you identify customers who are ready for expansion opportunities?

**Transformation questions:**
- Which adjacent categories should you move into?
- How are your customers helping you redefine the new North Star?

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**Velocity**

**Strategic questions:**
- How do you create and enable new lines of business?
- How do you keep the customer at the center of every process?

**Alignment questions:**
- What are the key hires (e.g., business line general managers, GEO executives) to support platform growth or global expansion?
- How frequently and seamlessly does your GTM enablement team work to create and deliver employee onboarding, bootcamps, certification, decks, playbooks, and quarterly business reviews?

**Transformation questions:**
- What’s stopping you from creating centers of excellence and benchmarking ramps and making investments toward even bigger growth?

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**Operations**

**Strategic questions:**
- What KPIs are you looking at to see if there is a platform-market fit?
- How are you adjusting the incentives of leaders and teams to deliver on the new KPIs?

**Alignment questions:**
- How do you create, maintain, and communicate a common GTM scorecard?
- How do you proactively look at churn and growth to address them before it’s too late?
- What data do you need to consistently review and deliver on business forecasts?

**Transformation questions:**
- What new products and services do you need to keep growing with your existing base?
- Which new markets can you test to open new opportunities?

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**Expansion**

**Strategic questions:**
- Which channels can you invest in for nonlinear growth?
- How do you create and enable new lines of businesses?

**Alignment questions:**
- What percentage of your revenue is coming from each line of business?
- How do you prioritize new product releases, budgets, and resources across multiple products?
- What percentage of revenue is coming from customers versus net new customers?

**Transformation questions:**
- What will it take to create the top ten biggest deals in your category with your platform + multiyear + precommit + pro-serve attachment rate?
- What percentage of your revenue is coming from six-figure deals?
What is preventing you from moving to the next business stage?

Go through this list and see if you can identify which of these issues are present in your company at the moment. You will have to address them now before you can gain some altitude and move onward and upward.

Any of the following can prevent you from leaving the *ideation* stage and entering the *transition* stage? Check all that apply.

- You're trying to scale but haven't found the ideal customer for your product.
- Heavy discounting and renewing down: your key use case is getting commoditized.
- Your brand and positioning are weak, leading to poor demand and win rates.
- There's no primary reason for churn, so there's no clear resolution.
- You have no common enemy, and therefore, you have no direction.
- Customers are unsure of the ROI of your product when renewal time approaches.
- What you sell is not what you deliver.
- You have a lack of repeatability in your sales team—relying on heroics of a few to hit plan.

Any of the following can prevent you from leaving the *transition* stage and entering the *execution* stage? Check all that apply.

- You've continued to focus on a single product because you have weak vision.
- You've underinvested in the distribution required for future revenue growth.
- You have only one way to hit your number, and there's a lack of predictability.
- Your second or third products are really just features of the first, which is a sign of a weak product strategy.
- Your second or third products aren't taking flight (but should be) due to poor incentive structures or enablement across your revenue teams.
- You're trying to compete on multiple fronts while dominating none.
- Everyone is working, but no one is winning: clear lack of executive alignment.
- Teams don't understand their role in executing the strategy, and they're ill-equipped to say no to anything.
GTM TEAM
GTM is a transformational process for accelerating your path to market with high-performing revenue teams delivering a Connected customer experience.

Not a strategy & not a project

Repeatable, scalable, revenue pipeline, at highest ROI

Marketing, sales, success + operations and enablement all working together!

Customer is recognized at every touch point. Connected brand experience without all the handoffs.
The role of GTM.

G2M Delivery
“Brand Experience”
Create a connected customer experience across Marketing, Sales, and Success

Company Strategy
“Purpose & Dreams”
Corporate & product strategy, positioning, messaging, and funding

Customer Outcomes
“Benefits realized”
Advocacy, Net Promoter Score, Retention, & Expansion

GTM lives in service of company strategy and is the vehicle by which the companies dreams are brought to its customers.
### 4 Key Stakeholders and their roles in their GTM process

<table>
<thead>
<tr>
<th>Investors</th>
<th>CEO</th>
<th>CMO</th>
<th>CRO</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What’s your role in GTM?</strong></td>
<td><strong>You are the guide.</strong> Create Centers of excellence and share best practices, benchmarks, and GTM playbooks relevant to the business stage.</td>
<td><strong>You are the owner.</strong> Transform and align executive team with incentives and KPI's across the 3 business stages.</td>
<td><strong>You are the galvanizer.</strong> Create a consistent brand experience across the buyer journey.</td>
</tr>
<tr>
<td><strong>What keeps you up at night around GTM?</strong></td>
<td>Is the market big enough? How scalable is the GTM motion? Do they have the right team?</td>
<td>What moves will help transform to the next business stage? How do we create single source of truth? How to make tradeoffs between growth, retention and new bets?</td>
<td>Is our brand positioning us as a leader? Is marketing creating fuel for sales? How are we turning customers into advocates?</td>
</tr>
<tr>
<td><strong>What will make your job easier?</strong></td>
<td>Coach CEO through the 3 P's of the business stages. Build a robust GTM peer-mentoring program to help portfolio companies navigate the ups and downs of growth.</td>
<td>Make revenue ops your best friend. Combine sales and customer success into one revenue organization.</td>
<td>Make CRO &amp; CFO your best friends. Turn your lead funnel into a revenue flywheel.</td>
</tr>
</tbody>
</table>
REVOPS
Sample Org

- **Rev Ops LEADER**
  - **CFO / COO / CRO**
  - **Enablement Organization**
    - **Tightly aligned**

- **CRM & Systems**
  - Admin
  - PM

- **Deal Desk**
  - Deal Desk
  - Commissions

- **Ops Mgr**
  - Sales Ops
  - CS Ops
  - Mktg Ops
  - Fin Ops
  - Product Ops
  - Data Ops

- **BI & Analytics**
  - Developer
  - Analyst

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GTM KPIs
Operations metrics and tech by stage

**Ideation**
*(problem-market)*

- Metrics by functions
  - Metrics by functions
  - Sales activities
    - (calls, demo’s, ops)
  - Marketing activities
    - (traffic, leads)
  - Funnel Conv rates & cost per lead
  - Bookings & Win rate

  **Tech:**
  - CRM, conversation tracking, CMS & MA,
  - Sales automation, contact data

**Transition**
*(product-market)*

- Metrics by account segments
  - Metrics by Segments Engagement
    - Pipeline coverage
    - Deal velocity
    - Average deal size
    - GRR
    - Efficiency metrics (magic number, CAC)

  **Tech:**
  - Ideation Tech + ABM, intent data, intelligence data,
    - Multi channel, Bi Analytics, Sales enablement & automated training -LMS / Coaching, CPQ/order mgmt , billing automation, CS automation)
    - (non integrated / iframed)

**Execution**
*(platform-market)*

- Metrics by customer cohorts
  - CLV, Time to value,
  - NPS, Customer ROI
  - Product line revenue & Pipeline
  - NRR / Net Expansion
  - Gross Margins
  - Growth by category

  **Tech:**
  - Transition Tech + CDP, integrated stack, AI/ML data stack, Customer Experience Management,
  - Sales Forecasting
# Sales-led SCORECARD

<table>
<thead>
<tr>
<th>Branding</th>
<th>Inbound Funnel</th>
<th>Conversion Metrics</th>
<th>Outbound Funnel</th>
<th>Revenue KPI’s</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inbound Calls &amp; Emails</td>
<td>Qualified Conversions</td>
<td>Site Conversion Rate</td>
<td>Outbound Engagement Rate</td>
<td>Revenue vs. Goal</td>
</tr>
<tr>
<td>35 Month</td>
<td>350 vs. 400 Month</td>
<td>350 vs. 400 Month</td>
<td>350 vs. 400 Month</td>
<td>350 vs. 400 Month</td>
</tr>
<tr>
<td>Site Traffic</td>
<td>Top Inbound Campaigns</td>
<td>Lead to Qual. Conversion Rate</td>
<td>Average Deal Size</td>
<td></td>
</tr>
<tr>
<td>6,090 Month</td>
<td>Partner Webinar: 50 Demo Request: 45 Customer Referral: 40 Month</td>
<td>50% Month</td>
<td>$55,000 Quarter</td>
<td></td>
</tr>
<tr>
<td>Engagement Spikes</td>
<td></td>
<td></td>
<td>Outbound Opportunities</td>
<td></td>
</tr>
<tr>
<td>300 Accounts Month</td>
<td></td>
<td></td>
<td>65 vs. 85 Month</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Opportunity Close Rate</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>25% Quarter</td>
<td></td>
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</tbody>
</table>
### EXECUTIVE CMO-CRO SCORECARD

**CMO Scorecard blog post**

**Excel template**

<table>
<thead>
<tr>
<th>Metric</th>
<th>Branding</th>
<th>Inbound Funnel</th>
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<th>Outbound Funnel</th>
<th>Revenue KPIs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inbound Calls &amp; Emails</td>
<td>35 month</td>
<td>350 vs. 400 month</td>
<td>Site Conversion Rate</td>
<td>5.70% quarter</td>
<td>1.3M vs. 1.5M month</td>
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<tr>
<td>Site Traffic</td>
<td>6,090 month</td>
<td>Top Inbound Campaigns</td>
<td>Lead to Qual Conversion Rate</td>
<td>50% month</td>
<td>1,225 out of 3,500 month</td>
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<tr>
<td>Engagement Spikes</td>
<td>300 Accounts month</td>
<td>45 vs. 60 month</td>
<td>Target Acct Engagement Rt</td>
<td>35% month</td>
<td>65 vs. 85 month</td>
</tr>
<tr>
<td>Share of Voice</td>
<td>33% quarter</td>
<td>Inbound Pipeline Gen</td>
<td>Deals advancing to Discovery</td>
<td>75 vs. 95 month</td>
<td>$2,275,000 quarter</td>
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<tr>
<td>Net Promoter Score</td>
<td>7.5 quarter</td>
<td>Inbound Pipeline Coverage</td>
<td>Deals advancing to Proposal</td>
<td>40 vs. 50 month</td>
<td>2x month</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$250 quarter</td>
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</table>

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# Executive GTM Scorecard

**Excel Template**

<table>
<thead>
<tr>
<th>Net Retention</th>
<th>Total New ARR</th>
<th>New Business ARR</th>
<th>Expansion ARR</th>
<th>Product Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Retention Leader Forecast</td>
<td>Total New ARR Leader Forecast</td>
<td>New Business ARR Leader Forecast</td>
<td>Expansion ARR Leader Forecast</td>
<td>Product Usage Forecast</td>
</tr>
<tr>
<td>90% forecasting 90% of goal</td>
<td>10M forecasting 100% of goal</td>
<td>7M forecasting 100% of goal</td>
<td>3M forecasting 100% of goal</td>
<td>10,000 Monthly Active Users</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Renewals Won by Week</th>
<th>Total New ARR by Week</th>
<th>New Business ARR by Week</th>
<th>Expansion ARR by Week</th>
<th>Actual Usage by Week</th>
</tr>
</thead>
<tbody>
<tr>
<td>$3,500,000 Gross Retention ARR Closed Won</td>
<td>$2,500,000 Closed Won Total New ARR</td>
<td>$2,000,000 Closed Won New Business ARR</td>
<td>$500,000 Closed Won Expansion ARR</td>
<td>Monthly Active Users 9,500</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Customer Success Qualified Leads</th>
<th>Total Open Pipeline</th>
<th>Total Open New Pipe</th>
<th>Total Open Expn Pipeline</th>
<th>Product Qualified Leads</th>
</tr>
</thead>
<tbody>
<tr>
<td>67</td>
<td>35M</td>
<td>25M</td>
<td>10M</td>
<td>50</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Weighted Pipeline GRR</th>
<th>Multi-Product Adoption</th>
<th>Leading New ARR Product Line</th>
<th>Leading Expansion Product Line</th>
<th>Customers - Usage Red Flag</th>
</tr>
</thead>
<tbody>
<tr>
<td>69%</td>
<td>47% vs. goal 60%</td>
<td>Line B: 80% to goal</td>
<td>Line C: 70% to goal</td>
<td>13</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Overall Weighted Pipeline</th>
<th>ARR by Segment</th>
<th>New Pipeline Funnel Efficiency</th>
<th>Expansion Funnel Efficiency</th>
<th>Gross Margin Current Qtr</th>
</tr>
</thead>
<tbody>
<tr>
<td>$10,030,005</td>
<td>45% Enterprise</td>
<td>Average Age: 90 days</td>
<td>Average Age: 40 days</td>
<td>75%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Customer Acct Engagement</th>
<th>A Account Engagement</th>
<th>B Account Engagement</th>
<th>Top 100 Accounts Campaign</th>
<th>Product Intent Trends (prospects)</th>
</tr>
</thead>
<tbody>
<tr>
<td>75% engagement</td>
<td>89% engagement</td>
<td>45% engagement</td>
<td>76% engagement</td>
<td>350 surging accounts</td>
</tr>
</tbody>
</table>

| 13% higher average deal | 25% faster sales cycle | 18 new opportunities | 75%                       |

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