

The logo for Coleman, featuring the word "COLEMAN" in a bold, white, sans-serif font. The letter "O" is stylized with a circular graphic element. The logo is centered within a solid red rectangular background.

COLEMAN

MAKE THE RIGHT MATCH[®]

Company Overview
For New Hire Orientation

COLEMAN



About Coleman



Our Commitment to
Quality



Our Services

Who We Are and What We Do...

Our Expertise is Finding Expertise

Coleman Research gives executives a better way to access industry knowledge.

We help investment management and private equity firms, consultants and corporations get the knowledge they need to make the more informed business decisions that create value...

... and **a competitive advantage.**

Our Global Locations

Positioned for the always-changing global economy

Over 230
employees



New York



London



Hong Kong



Raleigh



San Francisco



Boston

in 6 offices
worldwide

Our Global Clients

We have relationships with the world's leading consulting & investment management firms



8 Out of 10 of the top
**Global
Hedge Funds**

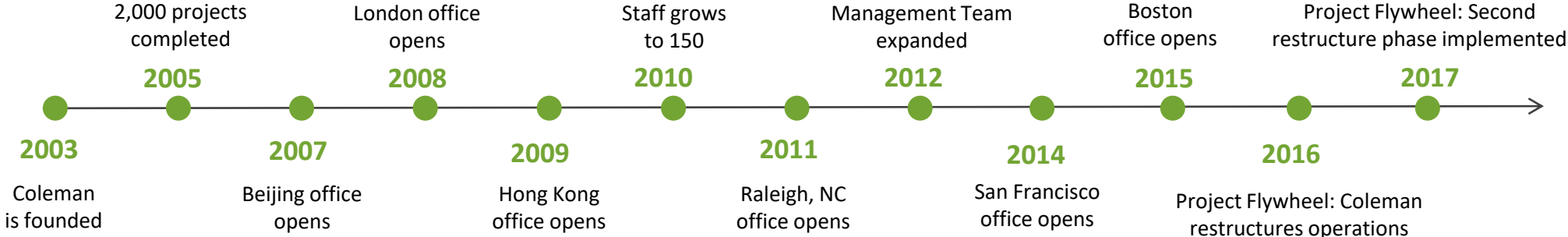
15 Out of 20 of the World's
**Top Private Equity
Firms**

14 Out of 20 of the Top
**Mutual Funds
Worldwide**

9 Out of 10 of the World's
**Largest Consulting
Firms**

An Industry Pioneer

We are an established expert network with over fourteen years of award-winning growth



Inc. 5000 List
Fastest Growing Company



Integrity Research
Top Expert Network



Ernst & Young Entrepreneur
Metro New York Finalist

Our Values

At Coleman, all of our relationships are built upon these core values:

Integrity

We are committed to doing what's right – for our clients, our staff and our communities.

Quality

Our people, processes and technology work together to deliver excellence, from the quality of the experts we provide, to the speed of our response times and the rigor of our compliance systems.

Collaboration

We empower our clients and each other to exceed common goals.



Kevin Coleman
*Chief Executive Officer &
President*

COLEMAN



About Coleman



Our Commitment to
Quality



Our Services

Quality Makes All the Difference

Continually Raising the Bar

Exceeding client expectations is central to everything we do at Coleman, from the **match quality** of the experts we provide, to the **speed** of our response times and the rigor of our **compliance** systems.

Through our unwavering focus on service, integrity and speed of execution, we challenge ourselves to continually raise the bar.

The Coleman Advantage

HOW WE SET OURSELVES APART:



Dynamic
Network



Industry
Expertise



Advanced Technology



Exceptional
Service

Extensive and Evolving Network

Each month we add **2,000** highly targeted experts to our network

FINDING FRESH INSIGHTS

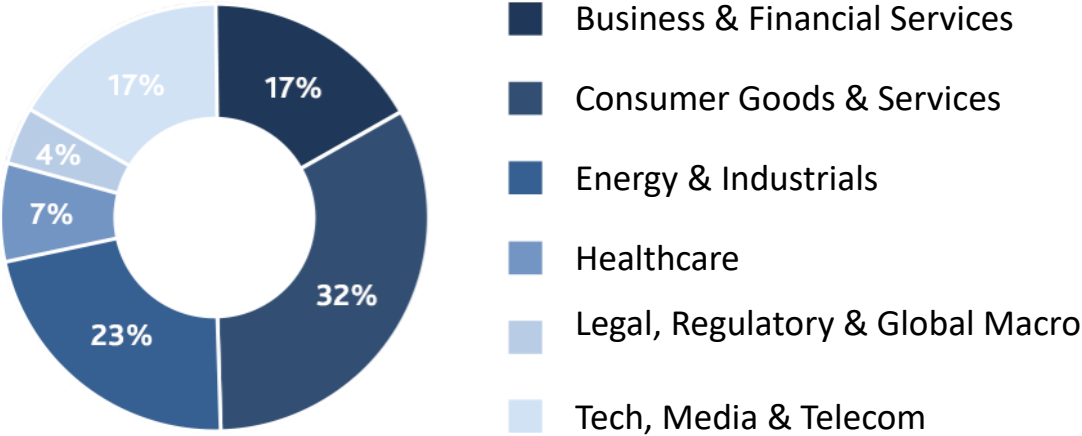
“Coleman offers us the most differentiated network of experts available from anyone.”

– Portfolio Manager at leading Mutual Fund

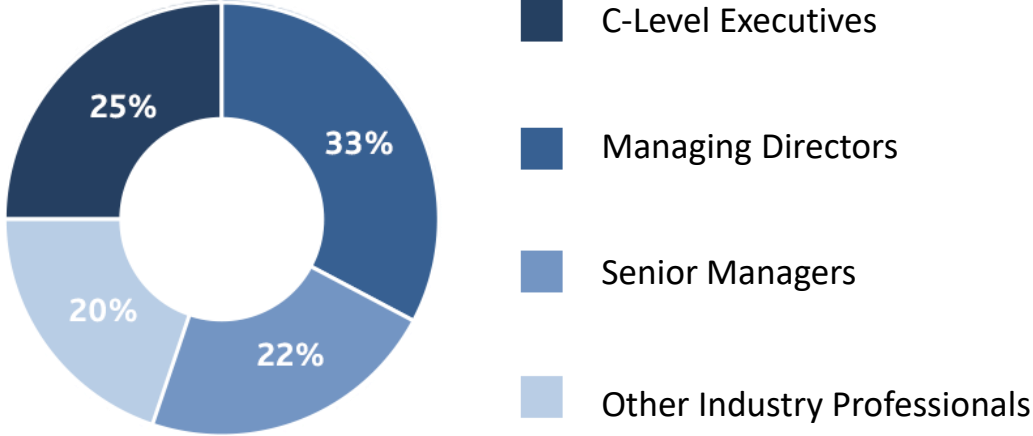
Network Coverage

200,000 Experts in 140 countries & real time recruiting in 20 languages

Coverage of All Industries



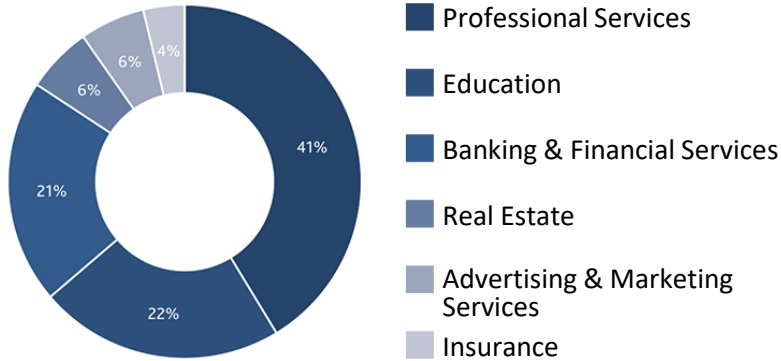
With Extensive Experience



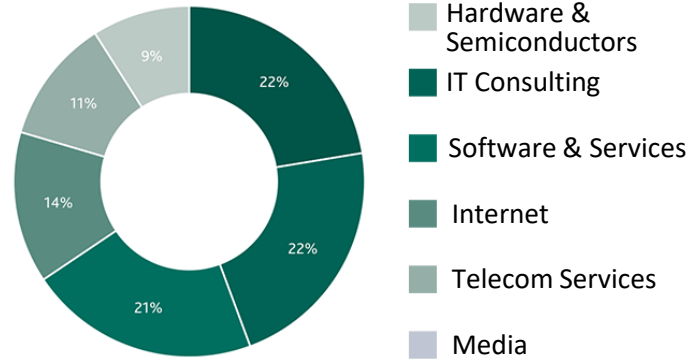
Network Coverage

Curated by Coleman Sector Specialists

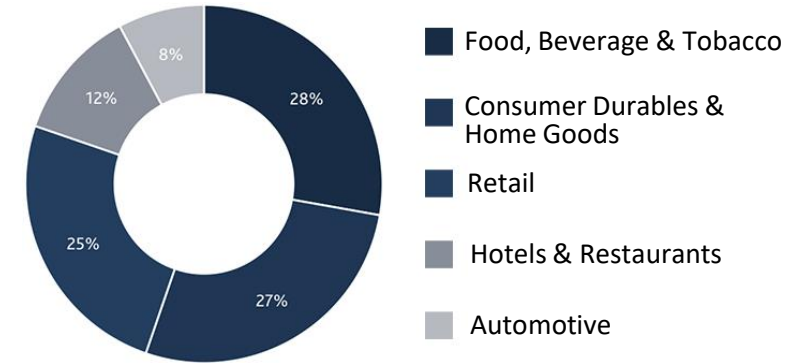
Business & Financial Services



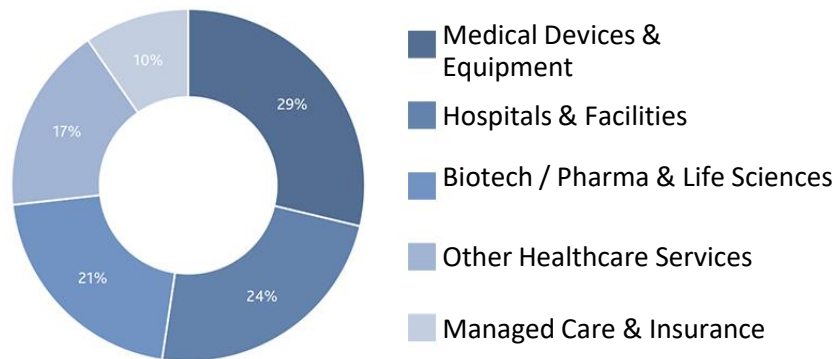
Tech, Media & Telecom



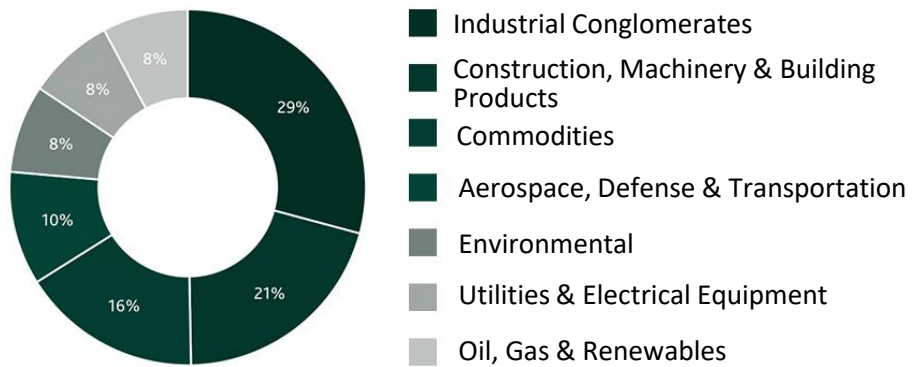
Consumer Goods & Services



Healthcare



Energy & Industrials



Advanced Technology

Our best-in-class technology allows us to make the right match - faster

“The Coleman Client Portal is excellent. It’s simple, intuitive and does a great job of showing the information we need without being cluttered.”

- Analyst at Boston-based Private Equity firm

Our Industry-Leading Expert & Client Portal

Coleman offers state of the art online platforms to both our Experts and Clients that are tailored to their firm's and personal preferences.



Easily Manage Projects

Clients & Experts can view and manage all of their projects – from their desktop or mobile.



Search for Experts

Clients can conveniently search by name, employer, and area of expertise.



Automated Scheduling

With one click, Clients can select the Expert, and our platform coordinates the rest.



Custom Compliance

Coleman's platform is customizable, making firm-specific compliance protocols easy to manage.



Automated Billing

Experts can set-up payment profiles and create invoices in a matter of seconds. Our platform handles the rest.

Our Industry-Leading Client Portal

Designed to make the research process more convenient and efficient

Search for experts and manage projects:

The screenshot shows the 'Coleman Test Project #139922' interface. It features a sidebar with navigation options: EXPERT SEARCH, SAVED EXPERTS, NEW PROJECT, PROJECTS (selected), CONSULTATIONS, HOSTED EVENTS, SURVEYS, and LOGOUT. The main content area is titled 'Coleman Test Project #139922' and includes an 'EXPORT' button. Below the title are tabs for 'EXPERTS' and 'CONSULTATIONS'. A search bar contains 'EXPAND ALL', 'Sort by Status', and 'FILTERS'. Three expert profiles are listed:

- CUSTOMER** (12/06/16) **NEW**
Coleman Test Advisor #1274990 To OK
Coleman Test Private Company
CEO (12/06/13 - Present)
VIEW FULL BIO
ABOUT THIS EXPERT: Coleman Test Advisor is a senior employee at Coleman Test Company, a leader in telecommunication services providing high-speed wireless access and bundled telecommunications services to the Greater Chicago area. In this role, he is responsible for the firm's global technology infrastructure.
Buttons: DECLINE, REQUEST INFO, SCHEDULE
- CUSTOMER** (10/21/16) **NEW**
Coleman Test Advisor #1251949 To OK
Coleman Test Private Company
CEO (10/21/13 - Present)
Buttons: DECLINE, REQUEST INFO, SCHEDULE
- PARTNER** (07/16/16) **NEW**
Coleman Test Advisor #1193711
Coleman Test Private Company
Vice President (1/15/16 - Present)
Buttons: DECLINE, REQUEST INFO, SCHEDULE

At the bottom left, it shows 'LOGGED IN AS Coleman Test Analyst #51773'.

Automated scheduling:

The screenshot shows the 'Schedule Consultation' interface for 'Coleman Test Project #139922'. It includes a sidebar with navigation options: EXPERT SEARCH, SAVED EXPERTS, NEW PROJECT, PROJECTS (selected), CONSULTATIONS, HOSTED EVENTS, SURVEYS, and LOGOUT. The main content area is titled 'Schedule Consultation' and includes a 'PROJECT' section for 'Coleman Test Project #139922' and an 'EXPERT' section for 'Coleman Test Advisor #1274990 To OK' (Coleman Test Private Company, CEO, 12/06/13 - Present, Expert Time Zone: Eastern Standard Time). Below this is a 'SET TIMES' section with a 'My Time Zone' dropdown set to '(UTC-05:00) Eastern Time (US & Canada)'. A calendar view for 'March 19 — 25, 2017' shows a grid of days and times. The grid has columns for Sun 3/19, Mon 3/20, Tue 3/21, Wed 3/22, Thu 3/23, Fri 3/24, and Sat 3/25. The time slots range from 9am to 5pm. Scheduled consultations are shown as pink blocks: 9:00 AM - 11:00 AM on Wed 3/22, 10:00 AM - 3:30 PM on Mon 3/20, and 3:00 PM - 6:00 PM on Fri 3/24. The user is logged in as 'Coleman Test Analyst #51773'.

Exceptional Service

Exceptional client service delivered by a dedicated Global Client Management Team

“Coleman goes out of its way to try and understand us and how we work.

Because they know what we are after and how we work, they are better at getting us the right kind of people to speak with.”

– Hedge Fund Analyst in NY

Driving Client Success Through Service

Better service results in better decisions



Dedicated client teams

Our client-focused team structure means an entire team is dedicated to understanding and meeting your needs.



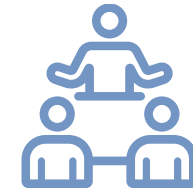
Service around the clock

We pass projects across offices in different time zones which improves turnaround time.



We make the right match

All of our experts are screened so that we can get our clients the right expert at the right time.

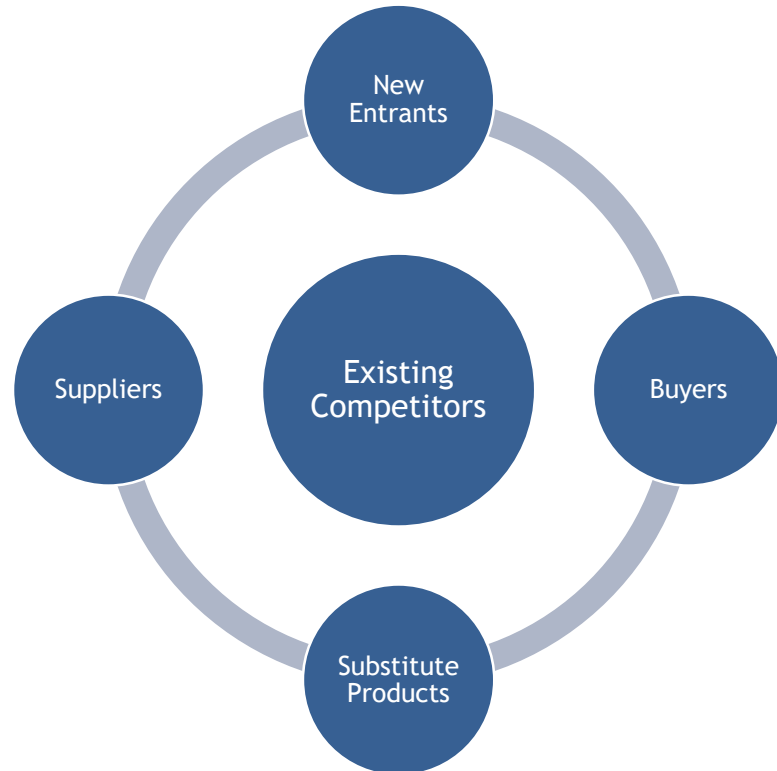


High-touch service

We work hard to understand your process and needs, and have a team of sector specialists to ensure we yield the right results.

How we approach projects

Starting with the strategic framework



Evaluating Market Dynamics from All Angles

- Although a client may come with a specific request, our Client Teams evaluate the project from all angles

Developing Concrete Vetting Criteria

- We work to establish the link to the project by focusing on key roles and responsibilities of our Experts & Leads

Additional Phone Vetting

- To ensure *Match Quality* for our clients we also vet Experts by phone to discuss experiences and conflicts

Presentation of Experts by Angle

- Client Teams present the most highly vetted Experts and their rationale for *Why* each individual is a good fit

Complete Workflow Solution

Our software makes us better, faster, and more efficient



Coleman is able to deliver better quality matches as a result of our investment in leading-edge data tag-and-search technology.

Coleman KnowledgeBroker™

Cutting edge proprietary matching engine

- Advanced algorithm and tools to target the right expert

Intelligent tagging systems

- By using Natural Language Processing (NLP), we are able to uncover contextual relationships, resulting in more targeted, relevant and fresh expertise

Advanced survey-enabled vetting technology

- Ensures the experts we present are top quality and meet your compliance requirements

COLEMAN



About Coleman



Our Commitment to
Quality



Our Services

Our Services

We build relationships that uncover the facts



1-on-1 Consultations

Connect with Coleman experts over the phone or in-person for channel checks, idea generation and industry education



Expert Surveys

Custom design qualitative research to reach any audiences across key industries and geographies.



Hosted Events

Access 35+ weekly conference calls featuring industry discussions moderated by experienced Coleman analysts

1-on-1 Consultations

Our clients can depend on Coleman to help them make more informed investment decisions

OUR SERVICE

- Access to subject-matter experts, by phone or in person.

HOW IT HELPS OUR CLIENTS

- Quickly get up to speed on latest industry trends and market dynamics.
- Perform due diligence and channel checks.
- Perform detailed qualitative research with subject-matter experts.
- Research potential new investment opportunities.

WHY COLEMAN IS THE RIGHT CHOICE

- A team of experienced research professionals is dedicated to a client's business. We learn their preferences, which means we can quickly connect them to the knowledge they need.
- Our proprietary search technology allows us to quickly make the right match on even the most challenging of topics.
- We continually refresh our network of experts to ensure our clients have access to the most topical and relevant knowledge.
- Our rigorous compliance framework is built on trust, transparency and sound ethics.

Expert Surveys

Fast and reliable insights from hard-to-reach business professionals

OUR SERVICE

- Access market intelligence from a panel of industry experts.
- Collect a large volume of data quickly and efficiently.
- Analyze detailed and actionable insights with confidence.

HOW IT HELPS OUR CLIENTS

- Our highly experienced, international team will:
 - Identify goals and requirements
 - Target qualified respondents from within and beyond our network
 - Design and administer the survey
 - Deliver superior-quality results

WHY COLEMAN IS THE RIGHT CHOICE

- We specialize in targeting hard-to-reach business professionals across all industries, job titles, and geographies.
- Our clients get reliable, superior-quality data so that they can make more informed decisions.
- Best-in-class, high-touch service.

Hosted Events

Providing insight on the key debates and critical variables driving controversial and widely-held stocks

OUR SERVICE

- Moderated conference call discussions with top Coleman experts on the fulcrum issues impacting company performance.

HOW IT HELPS OUR CLIENTS

- Analysis of company news, corporate earnings, catalysts & industry developments.
- Timely coverage of key issues as identified by senior Coleman Analysts.
- Proprietary research materials prepared by Coleman Experts.

WHY COLEMAN IS THE RIGHT CHOICE

- Hand-picked Premium and New Experts from the Coleman network.
- Prepared experts ready to discuss key issues impacting client investments.
- 35+ Hosted Events per week across all sectors:

Technology, Media & Telecom
Energy & Industrials
Consumer / Retail

Business & Financial
Healthcare
Legal & Regulatory

Hosted Events

Analyst moderated discussions with top Industry Experts



← Hosted Events

Event Details

- EXPERT SEARCH
- SAVED EXPERTS
- NEW PROJECT
- PROJECTS
- CONSULTATIONS
- HOSTED EVENTS
- SURVEYS
- LOGIN
- YOU ARE NOT LOGGED IN



(SNAP): Marketing Agency's Outlook for Spend

Our Expert Discusses Campaign Dynamics, Strengths / Weaknesses, Targeting & Measurement Capabilities, Instagram Stories, CPC Pricing Trends, Impact on Budgets, Snap/Media Agency Dynamics and Forecast

Wednesday, March 22 • 12:00PM Local Time

PRE-ORDER REPLAY

REGISTER

SCHEDULE 1-ON-1

Our Experience

Industry pioneers and financial research specialists lead our business



Kevin Coleman
Chief Executive Officer



Jeffrey Geisenheimer
Chief Financial Officer



Ostra Jewell
Head of People Strategy



Ron Waksman
Head of Product Development &
Technology



Venkat Krishnamoorthy
Chief Technology Officer



John Vander Vennet
Head of Sales & Client Management



Eva Zaeschmar
Chief Marketing Officer



Peter Dolezal
CCO & General Counsel

Time Tested and Designed for Success

Markets are dynamic. That's why we are, too.

OUR PROCESS



Search

Our global team works around the clock to deliver initial lists within hours – using our own network and custom recruiting.



Vet

We screen experts to ensure they are the right match for our clients' projects.



Present

We provide detailed expert notes to help clients select among a choice of experts.



Consult

Our scheduling team arranges the consultation, which occurs within our industry-leading compliance framework.

The logo for COLEMAN, featuring the word "COLEMAN" in a bold, white, sans-serif font. The letter "O" is stylized with two overlapping circles. The logo is centered within a solid red rectangular background.

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