



Company Backgrounder

Company Overview

Allegiance, Inc. provides Enterprise Feedback Management (EFM) solutions that help organizations drive growth and increase profitability through improved customer and employee loyalty and engagement. The Allegiance Engage Platform is a suite of web and phone-based services and best practices that allows companies to measure and manage customer and employee engagement and link them to real business outcomes. Serving as a centralized feedback collection system, the Engage Platform offers management tools and predictive analytics to help forecast future customer and employee behavior and its effects on profits and growth.

Allegiance serves more than 1500 customers of all sizes across a variety of industries. Allegiance is a privately owned company based in South Jordan, Utah. For more information about Allegiance, visit www.allegiance.com.

Company History

Allegiance was formed in 2005 when SilentWhistle merged with Allegiance Technologies. SilentWhistle, an ethics compliance company, was founded by Adam Edmunds in 2004 while he was still in college. Allegiance Technologies, which provided Web-based tools to track, monitor, and manage customer and employee feedback on a real-time basis, was founded in 2000 by Dr. Gary Rhoads, a professor of marketing at Brigham Young University (BYU). The combination of these two companies has created great opportunities for market and product expansion.

Currently, Allegiance employs an experienced team and an advisory panel of loyalty and engagement experts that help companies link customer and employee loyalty and engagement to profits.

The Allegiance Engage Platform

The Allegiance Engage Platform is a suite of Web and phone-based Enterprise Feedback Management (EFM) solutions that allow organizations to collect real-time feedback from all points of customer and employee interaction. Companies use Engage to gather, analyze, and respond in real-time to customer and employee complaints, comments, and suggestions, leading to higher engagement and growth. Leading indicators and predictive technology help companies tie soft data to hard business outcomes and manage engagement proactively instead of reactively.

The Allegiance Engage Platform is delivered through a hosted, software as a service (SaaS) offering. Engage components can be customized for each company's needs and incorporate a case management method to track feedback from submission to resolution.

The key components of the Allegiance Engage Platform include:

- **ActiveSurvey:** A tool to design, collect, and analyze surveys for a targeted group of customers/employees and integrate results with enterprise reports.
- **Customer/EmployeePulse (20/20 Vision):** A top-down analysis survey to measure attitudes and intentions of customers and/or employees such as stress/passion, productivity, engagement and turnover risk.

- **Customer/EmployeeVoice:** An always-on listening system to collect feedback from all points of contact and track and manage feedback through to resolution.
- **SilentWhistle:** A web and phone-based anonymous ethics reporting system ensuring Sarbanes-Oxley 301 compliance and deterring fraud and unacceptable behavior.
- **Reports/Analytics/Dashboards:** Includes leading indicators, predictive analytics, threshold alerts, qualitative response analysis and ROI executive dashboards. The culmination is the Allegiance Index, a real-time snap shot of employee and customer engagement and how it compares to specific business outcomes.
- **MysteryShopper:** A tool to measure an individual's experience with a product or service or with the organization in general

Allegiance Professional Services

The Allegiance Professional Services team includes experts in training, implementation, customer care, and strategic planning and consultation. This team of loyalty experts works closely with clients to ensure they maximize the opportunity offered by using Engage solutions and gain the highest ROI possible by growing their loyalty and engagement levels with customers and employees.

The Management Team

- **Adam Edmunds, President and CEO:** Adam Edmunds leads the company's vision to help organizations make customer/employee engagement a strategic priority for achieving success.
- **Greg Heaps, COO:** Greg Heaps oversees day-to-day operations for Allegiance, including customer care, human resources, sales, and marketing.
- **J.D. Jeppson, Vice President, Sales:** J.D. Jeppson is responsible for the management of sales operations for Allegiance, including direct sales, partners and resellers.
- **Brian Garner, VP of Finance:** Brian Garner is responsible for financial planning, reporting and administration for Allegiance.

Loyalty Experts

• **Dr. Gary Rhoads,** Allegiance co-founder and lead engagement expert, is a pioneer in the economics of customer and employee engagement and loyalty. He is an author, the head of the BYU Entrepreneur Center, has over 25 years of industry leadership, and is a sought-after speaker and consultant to top companies around the world. The Allegiance loyalty advisory team includes, Dr. David Whitlark, a loyalty expert and author, Kyle LaMalfa, a statistician and loyalty expert, and others.

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