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C-StoreMatrix™ *Supplier Preview*

ASPs

- What is it? Application Service Provider
- A hosted service
- An Internet leveraged service- networked based
- Referred to as the "Net's Killer App"
- ASP Companies manage high-availability data centers that deliver application hosting services.

Software firms scramble to sell online services

"Today there are more than 1,000 ASP companies, up from 100 a year ago."

USA Today - July 7, 2000

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Hosted ASP

- Lowers Cost of Ownership:
- Software Deployment
- Site Hardware
- Data Maintenance
- Application Maintenance
- Centralizes the Issues and Simplifies the Process

Forrester Research January 24, 2000 estimates 20% of total applications revenue will come from hosted services by 2003

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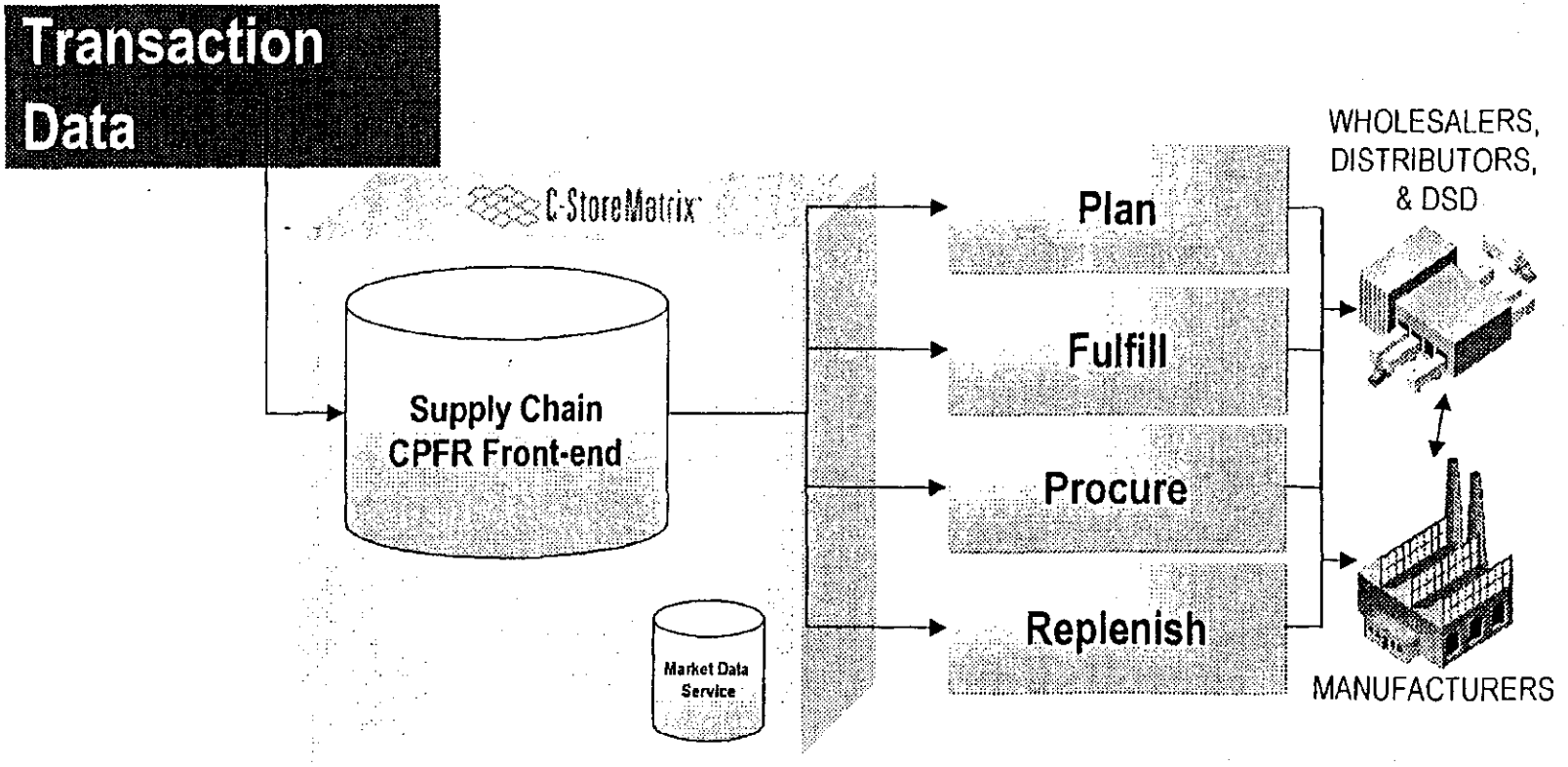
C-StoreMatrix™ *Supplier Preview*

Retailer Entry Points



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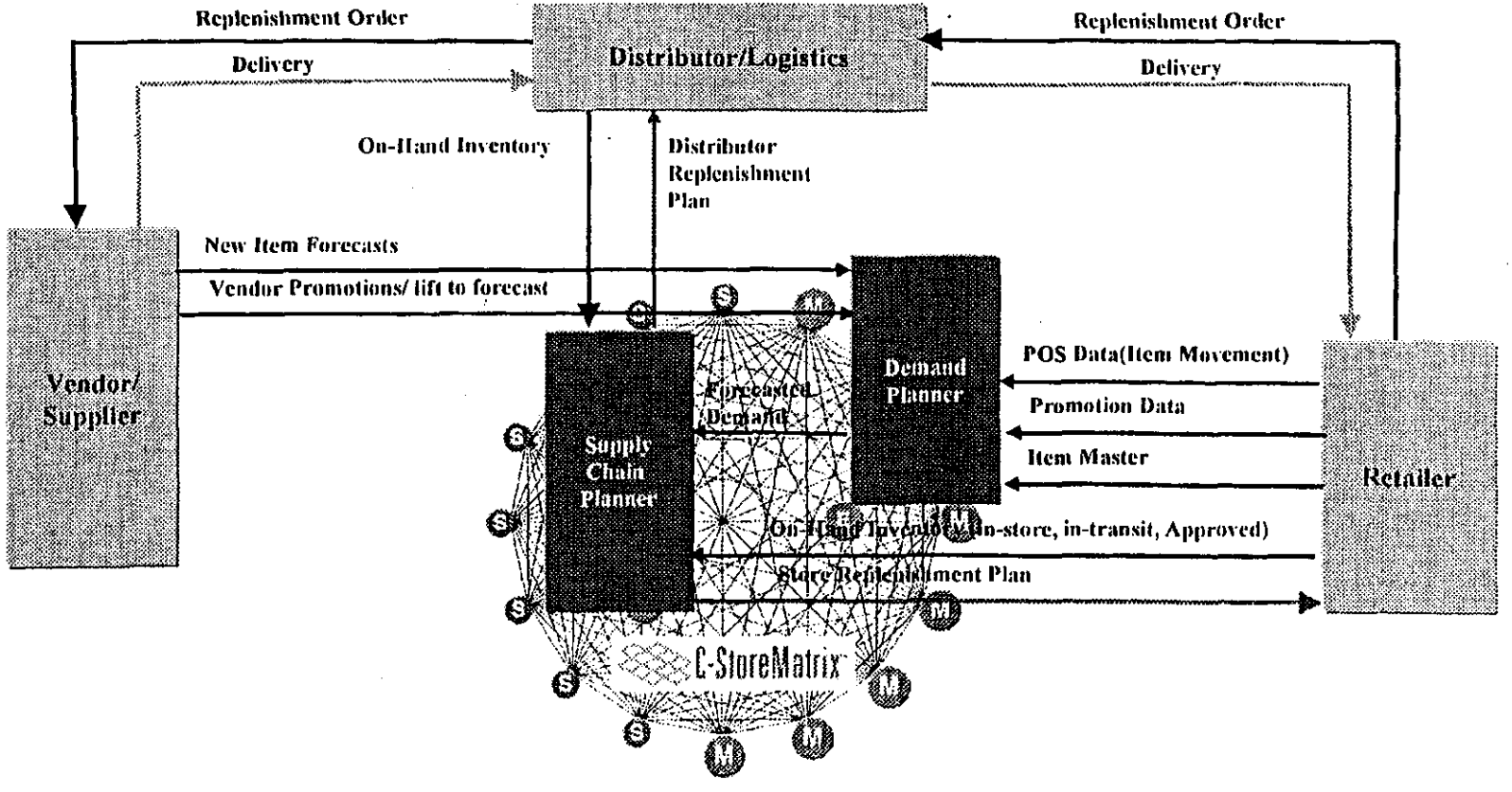
C-StoreMatrix™ *Supplier Preview*

Replenishment Planning

Process Flow



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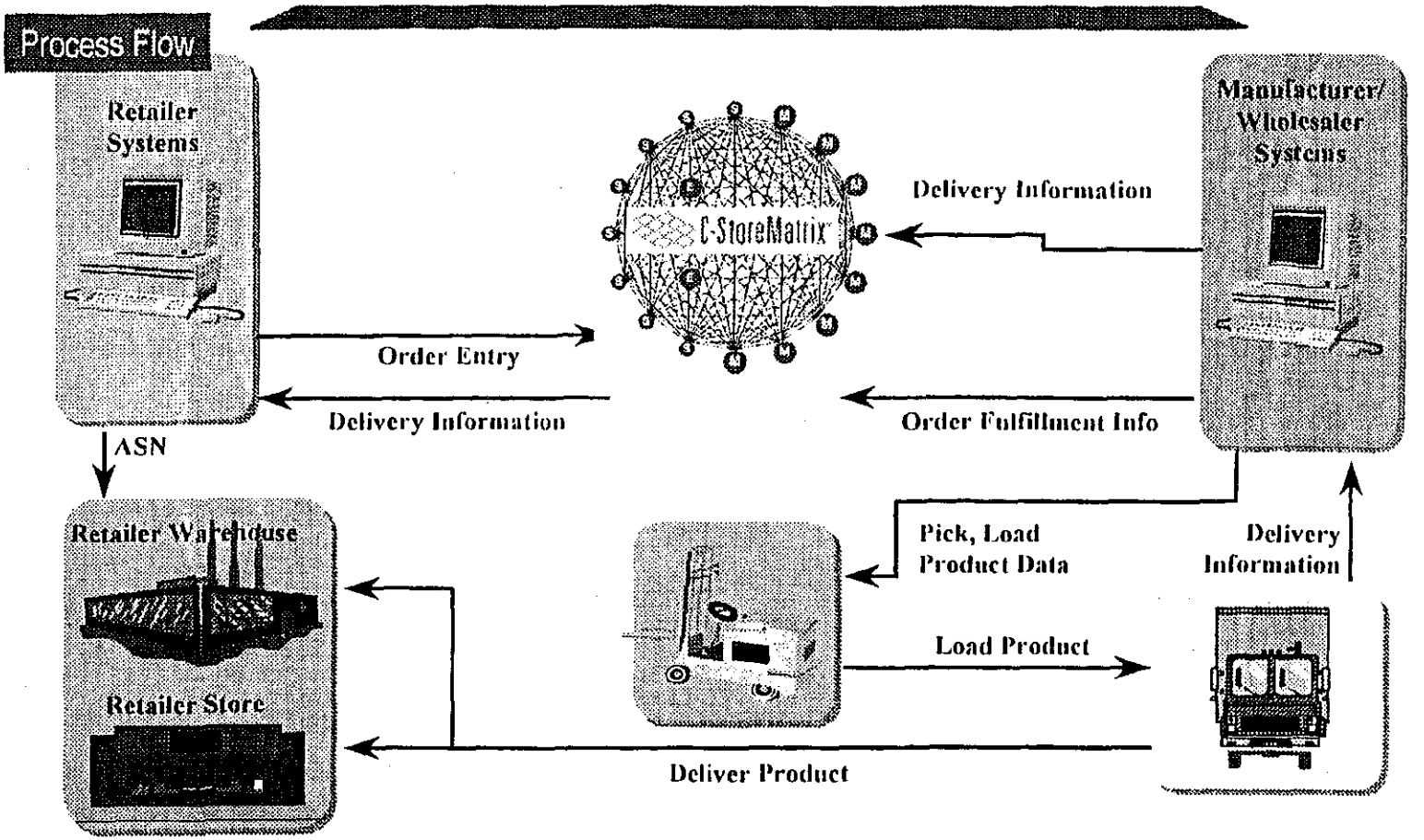
Order Fulfillment/Order Tracking



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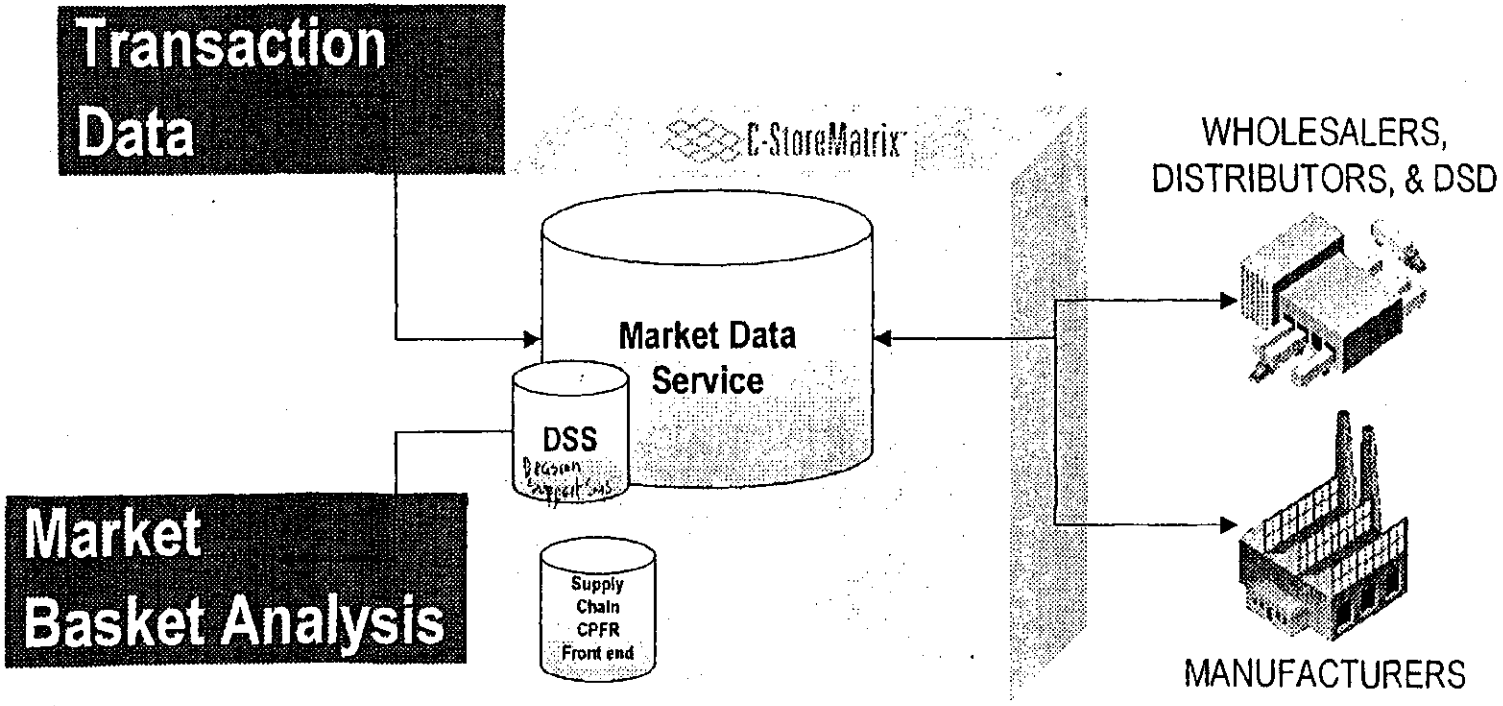
C-StoreMatrix™ *Supplier Preview*

Retailer Entry Points



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C-StoreMatrix™

Fees: $10 → 400-450/store/mo depending on what services are purchased.

Solution Subscription Levels

Store Hardware and Software Offering*
- PCs and scanning

*Provided by Third-party provider

P&S = Products & Services

Level 1 P&S: Retailer

ISP – Dial-up Internet Connectivity

Personalization

Content
- Industry and Functional Content
- e-Community
- Legal and Government Advocacy
- Reputation Broker

Retail Operations
- Indirect Procurement
- Auctions

Level 2 P&S: Retailer

LEVEL 1 P&S PLUS

Marketing and Category Management
- Broadcast Promotions and New Product Information
- NACS Category Management Tools
- Static Plan-o-gramming
- Basic Sales and Reporting
- Marketing Content

Retail Operations
- Item and Pricebook Management
- Pricebook Promotions Management

Level 3 P&S: Retailer

LEVEL 2 P&S PLUS

Marketing and Category Management
- Intermediate Category Management
- Efficient Assortment

Retail Operations
- B/O End-Of-Day
- B/O DSD Receiving
- B/O Inventory Management
- B/O Fuel Management
- Group Buying
- HR Management
- Advanced Reporting

Level 4 P&S: Retailer

LEVEL 3 P&S PLUS

Marketing and Category Management
- Data Warehouse and Decision Support Solutions
- Market Basket Analysis
- Advanced Plan-o-gramming
- Data Synchronization
- Marketplace Category Services

Retail Operations
- Shelf Labeling
- Bill Presentment
- Store Level Price Optimization
- B/O Wet Stock Management
- Computer Based Training
- Labor Scheduling and Management

Supply Chain Management
- B/O Computer Assisted Ordering
- CPFR Demand Management

Increased Levels of Operating Efficiencies and Trading Partner Integration

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C-StoreMatrix™ *Supplier Preview*

Ala Carte Subscription Services

Each service is priced separately and can be evaluated

MENU

- Employee Recruitment
- Fuel Replenishment
- Web Conferencing
- Financial Services
- Scan Based Trading
- Accounting Interface
- Benefits & Compensation
- Loyalty Programs
- One -to- One Marketing
- Home/Office Shopping
- Call Center and Kiosk Ordering
- Foodservice Management (Fast food service management)
- Outsourcing

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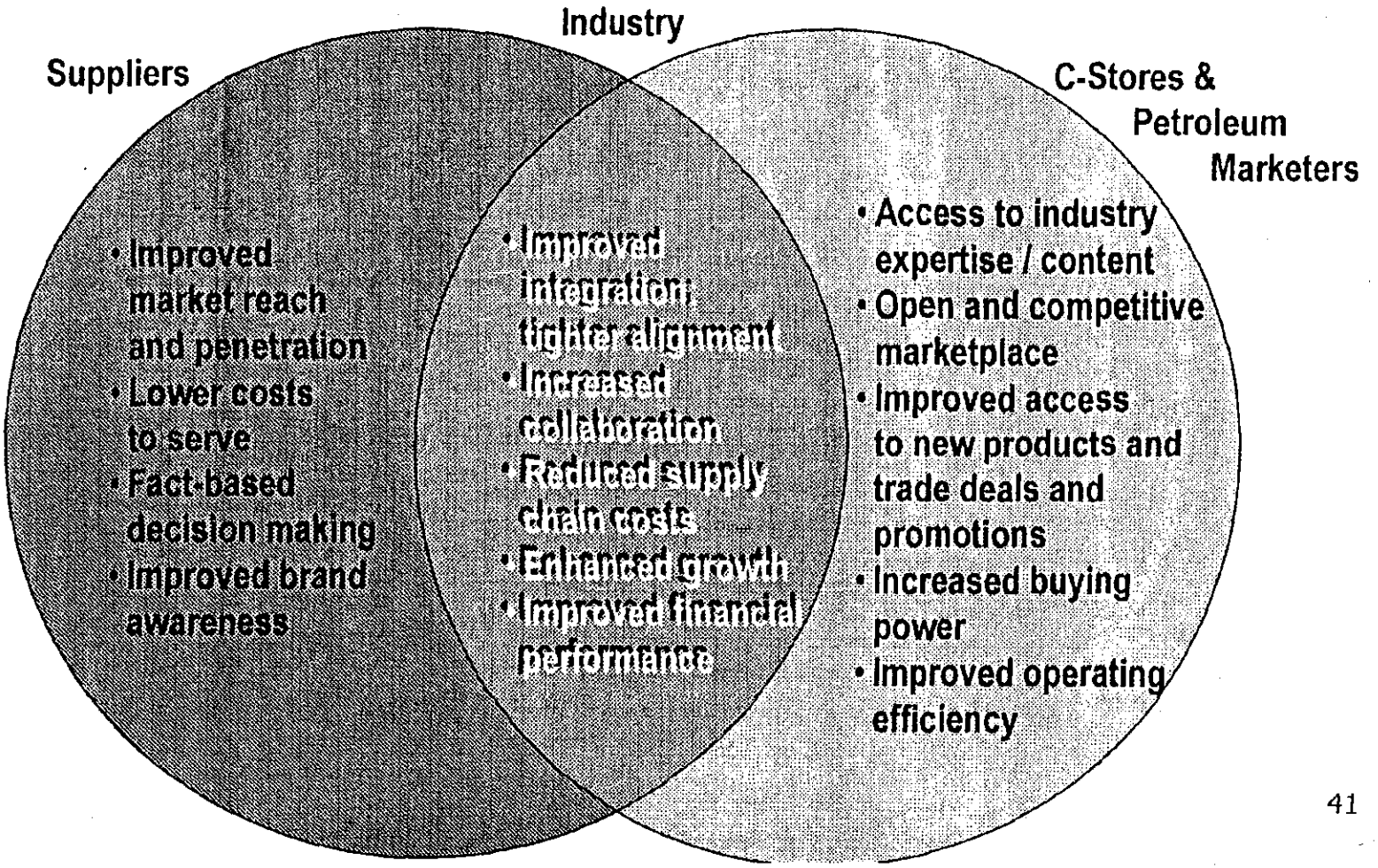
Mike Davis

C-StoreMatrix™ *Supplier Preview*

C-StoreMatrix Value Proposition Overview



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C-StoreMatrix Supplier Preview

Value to Manufacturers

- Virtual platform to increase alignment and integration of major business processes with key trading partners
- Ability to reach new customers|markets more efficiently and effectively
- Ability to access aggregated retailer consumption and profitability data to support strategic marketing and merchandising decisions
- ...and
  - Referral fees for bring current and future customers to the Matrix
  - Sales force commissions for selling CSM
  - Equity

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C-StoreMatrix™ *Supplier Preview*

Value to Wholesalers and Distributors

- Virtual platform to increase alignment and integration ...with key trading partners
- Ability to reach new customers|markets
- Ability to access aggregated retailer data
- Full access to CSM services to round out your service offerings
- and...
  - Referral fees for bringing current and future customers to the exchange
  - Sales force commissions for selling CSM
  - Equity

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C-StoreMatrix™ *Supplier Preview*

Value to Technology Providers

- Full access to CSM services to round out your solution offerings
- Royalties from the sale of your products and services
- Referral fees for bringing current and future customers to the exchange
- Sales force commissions for selling CSM
- Consulting and implementation revenues
- Participation in multiple "Trade Matrix" exchanges
- Equity
- Access to aggregated data

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Value to Service Providers

- Improved reach
- Reduced customer acquisition costs
- Royalties from the sale of your products and services
- Referral fees for bringing current and future customers to the exchange
- Sales force commissions for selling CSM
- Participation in multiple "Trade Matrix" exchanges
- Equity

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C-StoreMatrix™ *Supplier Preview*

Value to Medium & Large Retailers

- Single connection to all your suppliers
- Ability to evaluate and select products and services in an open and competitive marketplace
- Lower cost entry to advanced store automation and TradeMatrix/i2 supply chain optimization tools
- Lower cost entry to advanced products like DSS/Data Warehousing tools and...
  - Referral fees for bring current and future suppliers to the Matrix
  - Access to aggregated data
  - Equity

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Value to Small Retailers

- Ability to operate as a larger, virtual c-store with improved access to new products and trade promotions and increased buying leverage
- Improved operating efficiency and reduced IT costs through ASPs
- and...
  - Referral fees for bring current and future suppliers to the Matrix
  - Access to aggregated data
  - Equity

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C-StoreMatrix™ *Supplier Preview*

Value to Petroleum Marketers

- Personalized, branded site
- Ability to operate as a larger, virtual c-store with improved access to new products and trade promotions and increased buying leverage
- Improved operating efficiency and reduced IT costs through ASPs
- and...
  - Referral fees for bring current and future customers to the Matrix
  - Access to aggregated data
  - Equity

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C-StoreMatrix™

Participation

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C-StoreMatrix™ *Supplier Preview*

Tex.

Two Ways to Participate

① Participation

② Equity ownership and participation

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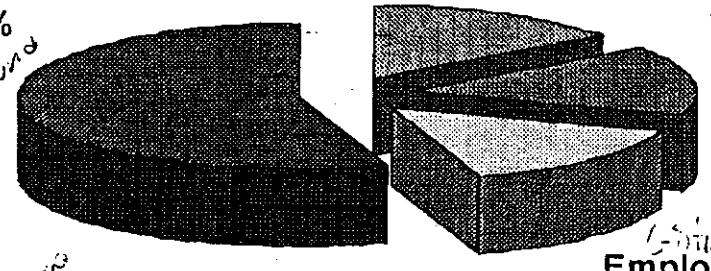
C-StoreMatrix™ *Supplier Preview*

Equity Ownership and Participation

- C-StoreMatrix is an alliance of NACS, i2, and Point of Sale Ltd. to be headquarted in Dallas
- The Industry will own more than half of C-StoreMatrix supporting our guiding principle to be the "C-Store Industry Marketplace"



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C-StoreMatrix™ *Supplier Preview*

Marketplace Governance

- Initial board consists of five members:
  - Dean Durling - NACS Chairman, Chairman Quik Chek Food Stores
  - Teri Richman – Sr. Vice President Research and Industry Affairs
  - Tom Rhoads - Vice President, eMarketplaces - Consumer Goods and Retail, i2 Technologies
  - Larry Allman - President, StorePoint (Point of Sale Ltd. US division)
  - CEO - TBD
- All board seats will be filled as equity is sold and will be elected on an annual basis

NACS gets two votes to [illegible] observers

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C-StoreMatrix™ *Supplier Preview*

Marketplace Governance (Contd.)

- Through the equity participation process, each stakeholder will be eligible to vote for a slate of nominees to the board. A minimum of 5% equity entitles the company to a board seat. An illustrative example of a 20 member board is as follows:
  - 4 Retailer
  - 4 Wholesaler
  - 5 Manufacturer
  - 2 Service Provider
  - 5 Initial Board Members (NACS-2, i2-1, Point of Sale Ltd.-1, CEO-1)
- Day to day direction will be provided to C-StoreMatrix management through a five member operating committee.

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Marketplace Governance (Contd.)

- Equity will be offered to retailers, wholesalers, manufacturers, and service providers who commit their organizations' participation in the exchange
  - Participation includes
    - Capital investment
    - Intellectual property
    - Technology
    - Spend

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Advantages to Early Investors

- Initial equity investors (up to 5% in the first round), will have the right of first refusal in the second round to buy an additional 5%
- Board representation for 5% equity holders
- Quickly help shape business and influence on a continual basis
- Revenue generation potential
  - Joint application development and associated revenue share
  - Referral fees
- Direct input into the development and prioritization of C-StoreMatrix product and solution offering

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C-StoreMatrix™ *Supplier Preview*

Advantages to Early Adopters

- Seen as 'leader' and "change agent' in emerging business|economy
- Influence
- Head start
- Revenue generation potential through referral fees

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Mike [illegible]

C-StoreMatrix *Supplier Preview*

Our Expectations of Supplier Partners

CSM will provide "house brand" services (hosted [illegible]) [illegible]

- Current and/or future products and services
- Leverage use of your sales force to sign up your current and future customers
- Interfaces
- Access to data with appropriate retailer agreements
- Spend

Have already met with 6 technology providers.

[illegible] money:

- Commissions on [illegible] - Advertising [illegible] of [illegible] to be [illegible] (or [illegible] generator)
  [illegible] CSM
  [illegible]
- [illegible] Sale of data
- Subscription fees

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C-StoreMatrix Supplier Preview

Next Steps

- Currently all CSM partners are operating under MoU. Expect to finalize within 2 days
- Will have investor & user contracts within 1 w
- Turn C-StoreMatrix on in [illegible]
  What will be available
  → Level 1 pass & sucs p.3

- Oct 21 is NACS show

Let's make a commitment to get...

- Your business development people together with us to talk about - sales and marketing, revenue potential, equity, etc.
- Your technology people together with our technology people to discuss the specifics around 'connecting' to C-StoreMatrix.

Will make BP available to [illegible] if they sign an NDA.

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ABOUT CIGNAL

Cignal

GLOBAL COMMUNICATIONS

Cignal is a global data carrier offering network connectivity solutions to ISPs, ASPs, content providers, and other web-centric businesses.

Cignal's services are designed and engineered ...

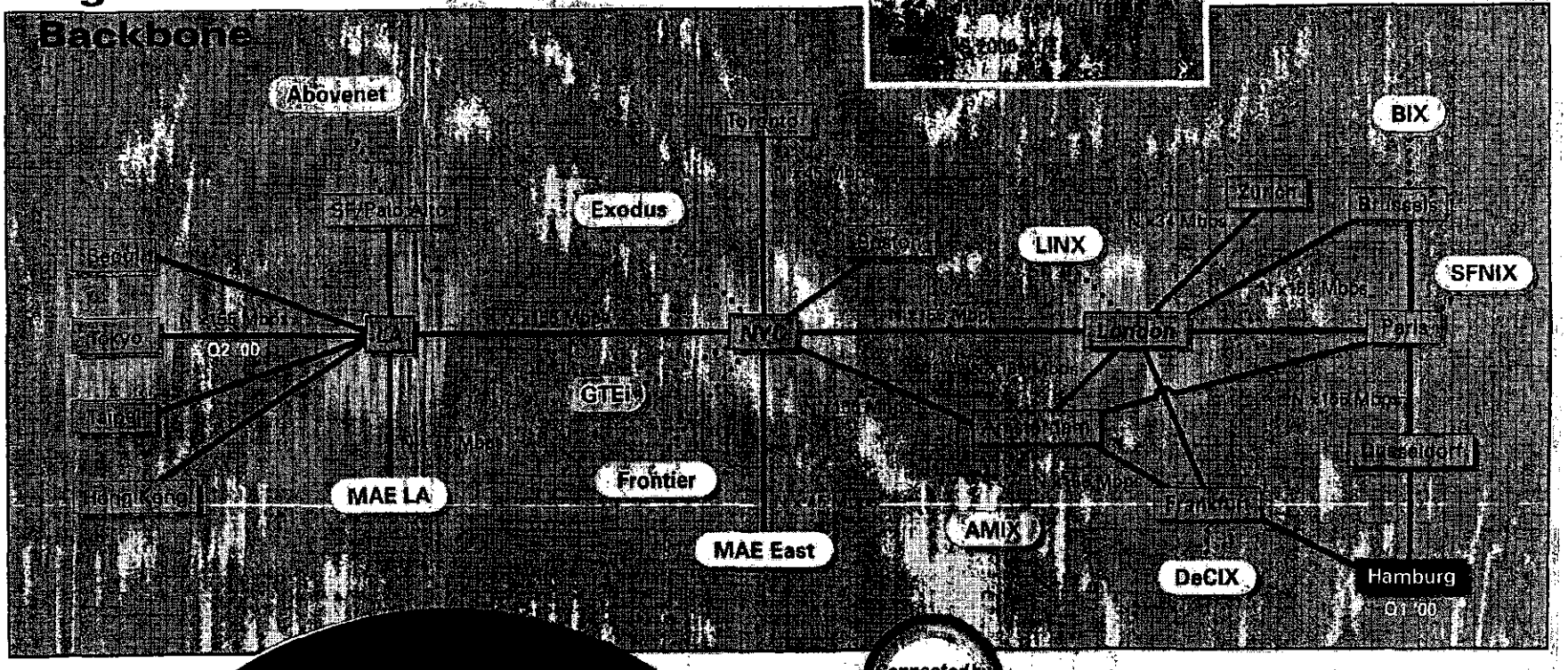
- To meet our customers' constantly expanding needs for scalable bandwidth.
- To provide consistently reliable and secure high-bandwidth Internet connectivity.
- To address the urgent demand for content-rich, real-time and broadband Internet services.

www.cignal.com

Cignal is operational in 12 countries with 15 POPs throughout Asia, North America and Europe. By yearend 2000, Cignal will be in 25 countries.

Our strategy is to offer the most competitive services available today while positioning our customers to take advantage of the global growth in multimedia Internet applications and content.

Cignal's ATM/IP Backbone



Connected by Cignal

Worldwide Headquarters

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Voice: 617.588.8000
Fax: 617.588.8001
E-mail: info@cignal.com

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Cignal
ATM Data Connect Service

Ideal for ISPs, carriers, web hosting and Internet application providers that need to implement global networking solutions across multiple countries, locations or cities.

ATM Data Connect provides highly scalable meshed or multipoint configurations for Internet, data, voice, or video applications.

The network is designed to accommodate companies with fast growing and unpredictable traffic demands.

ATM Data Connect features:

- **Bursting:**
  Gain more throughput for your data than available with private lines. All Data Connect configurations include bursting to 150%.
- **Flexible Bandwidth:**
  Bridge the gap between T1s /E1s and DS3s/E3s. ATM Data Connect can be ordered in any configuration of 1 Mbit allowing customers to order only the capacity they need.
- **Scalable Bandwidth:**
  Customers can add bandwidth and locations often within hours.
- **Low Pricing:** Always less expensive than private line solutions.

Cignal
ClearChannel Service

Ideal for point-to-point connections as a better alternative to private line solutions.

Cignal ClearChannel Service supports applications such as NAP and MAE connections.

Cignal's ClearChannel Service is designed to accommodate real time services and applications that require dedicated connectivity.

Cignal ClearChannel features

- **Flexible Bandwidth:**
  Unlike private lines, ClearChannel Service can be ordered in 1Mbit/s increments, allowing customers to grow as they need without paying for more than they need.
- **Flexible Pricing:**
  Cignal ClearChannel Service is always less expensive than private lines.
- **Superior Network Management:**
  ClearChannel Service includes circuit re-routing, and real-time utilization monitoring.
- **High Bandwidth Connections:**
  Cignal ClearChannel Service supports connections up to STM1/OC3.

Connected by Cignal

Cignal
Internet Gateway Exchange Service

Ideal for ISPs, web hosting companies and online service providers that need guaranteed Internet and content access service.

Internet Gateway Exchange Service sends Internet traffic directly to the WWW's top content sites along the most direct, low-hop route available. Cignal accomplishes this by avoiding congested public peering, interconnecting directly with major content hosting companies and Internet backbones, and deploying content distribution technologies within its own private broadband network.

Internet Gateway Exchange features:

- **High Performance:**
  Direct access to major Internet backbones, web hosting companies and content delivery networks.
- **Superior Quality:**
  Cignal backs up its network with quality of service (QoS) guarantees.
- **Scalable Bandwidth:**
  Customers can add bandwidth within hours and expand to 155Mbit/s.
- **Competitively-Priced:**
  Prices are among the most competitive in the market.
- **International Coverage:**
  Internet Gateway Exchange Service is specifically designed to provide fast, low-hop access to the top international backbones and Internet content sites.

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