
To: Claire F. Hawkins(ip@foster.com)
Subject: U.S. Trademark Application Serial No. 97120866 - FUTURIAN - 511089-62000
Sent: August 23, 2022 01:07:07 PM EDT
Sent As: tmng.notices@uspto.gov

Attachments

[4627909](#)

[2794423](#)

[screencapture-www-merriam-webster-com-dictionary-futurian-16612679300191](#)

[screencapture-www-merriam-webster-com-dictionary-futurion-16612680535381](#)

[screencapture-www-merriam-webster-com-dictionary-future-16612682635611](#)

[screencapture-www-rubinbrown-com-Services-business-advisory-services-data-assurance-and-analysis-aspx-16612695211921](#)

[screencapture-www-rubinbrown-com-Services-business-advisory-services-aspx-16612695984821](#)

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[screencapture-www-reply-com-breed-reply-en-breed-reply-active-operational-investor-16612717636051](#)

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[screencapture-uaoenterprises-com-index-php-services-items-item-19-integration-16612720927011](#)

[screencapture-uaoenterprises-com-index-php-services-items-item-18-business_intelligence-16612721447191](#)

United States Patent and Trademark Office (USPTO) Office Action (Official Letter) About Applicant's Trademark Application

U.S. Application Serial No. 97120866

Mark: FUTURIAN

Correspondence Address:

CLAIRE F. HAWKINS
FOSTER GARVEY P.C.
1111 THIRD AVENUE, SUITE 3000
SEATTLE WA 98101 UNITED STATES

Applicant: Futurian LLC

Reference/Docket No. 511089-62000

Correspondence Email Address: ip@foster.com

NONFINAL OFFICE ACTION

The USPTO must receive applicant's response to this letter within six months of the issue date below or the application will be abandoned. Respond using the Trademark Electronic Application System (TEAS). A link to the appropriate TEAS response form appears at the end of this Office action.

Issue date: August 23, 2022

The referenced application has been reviewed by the assigned trademark examining attorney. Applicant must respond timely and completely to the issues below. 15 U.S.C. §1062(b); 37 C.F.R. §§2.62(a), 2.65(a); TMEP §§711, 718.03.

SUMMARY OF ISSUES:

- Section 2(d) Refusal - Likelihood of Confusion
- Identification of Services Amendments Required

SECTION 2(d) REFUSAL - LIKELIHOOD OF CONFUSION

Registration of the applied-for mark is refused because of a likelihood of confusion with the mark in U.S. Registration No. 2794423 and 4627909 . Trademark Act Section 2(d), 15 U.S.C. §1052(d); *see* TMEP §§1207.01 *et seq.* See the attached registration.

Here, applicant's mark is FUTURIAN for

Class 35: Business organization and management consulting; management consulting services; new business venture development and formation consulting services; association services, namely, organizing an exclusive membership for leaders and entrepreneurs and promoting the interests of members thereof; association services, namely, organizing a business network for entrepreneurs and leaders and promoting the interests of members thereof

Class 36: Incubation services, namely, providing financing, advisory services, fundraising assistance, and introductions to start-ups and existing businesses and their leaders; investment advisory services

Class 41: Arranging and conducting of classes, seminars, conferences, workshops, trainings, and presentations in the fields of leadership, mental health, health, wellness, research and development, and medicine and treatments therefor; educational services, namely, conducting classes, seminars, conferences, workshops, trainings, coaching services, and presentations in the fields of leadership, mental health, health, wellness, and research and development, medicine and treatments therefor and distribution of training materials in connection therewith; continuing education services, namely, providing live and on-line continuing education classes, seminars, conferences, workshops, trainings, and presentations in the field of leadership, mental health, health, wellness, and research and development, medicine and treatments therefor

The registered marks are:

- U.S. Registration No. 2794423 FUTURION for "Business forecasting and sales analysis services" in Class 35.
- U.S. Registration No. 4627909 FUTURIAN for "Computer systems integration services" in Class 42.

Trademark Act Section 2(d) bars registration of an applied-for mark that is so similar to a registered mark that it is likely consumers would be confused, mistaken, or deceived as to the commercial source of the services of the parties. *See 15 U.S.C. §1052(d)*. Likelihood of confusion is determined on a case-by-case basis by applying the factors set forth in *In re E. I. du Pont de Nemours & Co.*, 476 F.2d 1357, 1361, 177 USPQ 563, 567 (C.C.P.A. 1973) (called the “*du Pont* factors”). *In re i.am.symbolic, llc*, 866 F.3d 1315, 1322, 123 USPQ2d 1744, 1747 (Fed. Cir. 2017). Any evidence of record related to those factors need be considered; however, “not all of the *DuPont* factors are relevant or of similar weight in every case.” *In re Guild Mortg. Co.*, 912 F.3d 1376, 1379, 129 USPQ2d 1160, 1162 (Fed. Cir. 2019) (quoting *In re Dixie Rests., Inc.*, 105 F.3d 1405, 1406, 41 USPQ2d 1531, 1533 (Fed. Cir. 1997)).

Although not all *du Pont* factors may be relevant, there are generally two key considerations in any likelihood of confusion analysis: (1) the similarities between the compared marks and (2) the relatedness of the compared services. *See In re i.am.symbolic, llc*, 866 F.3d at 1322, 123 USPQ2d at 1747 (quoting *Herbko Int'l, Inc. v. Kappa Books, Inc.*, 308 F.3d 1156, 1164-65, 64 USPQ2d 1375, 1380 (Fed. Cir. 2002)); *Federated Foods, Inc. v. Fort Howard Paper Co.*, 544 F.2d 1098, 1103, 192 USPQ 24, 29 (C.C.P.A. 1976) (“The fundamental inquiry mandated by [Section] 2(d) goes to the cumulative effect of differences in the essential characteristics of the goods [or services] and differences in the marks.”); TMEP §1207.01.

Similarity of the Marks

Marks are compared in their entireties for similarities in appearance, sound, connotation, and commercial impression. *Stone Lion Capital Partners, LP v. Lion Capital LLP*, 746 F.3d 1317, 1321, 110 USPQ2d 1157, 1160 (Fed. Cir. 2014) (quoting *Palm Bay Imps., Inc. v. Veuve Clicquot Ponsardin Maison Fondee En 1772*, 396 F.3d 1369, 1371, 73 USPQ2d 1689, 1691 (Fed. Cir. 2005)); TMEP §1207.01(b)-(b)(v). “Similarity in any one of these elements may be sufficient to find the marks confusingly similar.” *In re Inn at St. John’s, LLC*, 126 USPQ2d 1742, 1746 (TTAB 2018) (citing *In re Davia*, 110 USPQ2d 1810, 1812 (TTAB 2014)), *aff’d per curiam*, 777 F. App’x 516, 2019 BL 343921 (Fed. Cir. 2019); TMEP §1207.01(b).

Here, applicant's mark is FUTURIAN.

First, the mark in U.S. Registration No. 4627909 is FUTURIAN. This is identical to applicant's mark. FUTURIAN has no particular meaning in English and is a coined term. See <https://www.merriam-webster.com/dictionary/futurian>. Therefore, the marks are identical in sound, appearance, and meaning.

Second, the mark in U.S. Registration No. 2794423 is FUTURION. This is nearly-identical to the applicant's mark, differing only in a single letter. Therefore this is highly similar in sound and appearance. FUTURION also has no meaning in English. See <https://www.merriam-webster.com/dictionary/futurion>.

However, both appear to be plays on the word FUTURE. See <https://www.merriam-webster.com/dictionary/future> (defining FUTURE as "an expectation of advancement or progressive development"). Therefore, this creates a similar impression of advancement or progress.

Therefore, the marks are confusingly similar.

Comparison of the Services

The services are compared to determine whether they are similar, commercially related, or travel in the same trade channels. See *Coach Servs., Inc. v. Triumph Learning LLC*, 668 F.3d 1356, 1369-71, 101 USPQ2d 1713, 1722-23 (Fed. Cir. 2012); *Herbko Int'l, Inc. v. Kappa Books, Inc.*, 308 F.3d 1156, 1165, 64 USPQ2d 1375, 1381 (Fed. Cir. 2002); TMEP §§1207.01, 1207.01(a)(vi).

Here, applicant's services are:

Class 35: Business organization and management consulting; management consulting services; new business venture development and formation consulting services; association services, namely, organizing an exclusive membership for leaders and entrepreneurs and promoting the interests of members thereof; association services, namely, organizing a business network for entrepreneurs and leaders and promoting the interests of members thereof

Class 36: Incubation services, namely, providing financing, advisory services, fundraising assistance, and introductions to start-ups and existing businesses and their leaders; investment advisory services

Class 41: Arranging and conducting of classes, seminars, conferences, workshops, trainings, and presentations in the fields of leadership, mental health, health, wellness, research and development, and medicine and treatments therefor; educational services, namely, conducting classes, seminars, conferences, workshops, trainings, coaching services, and presentations in the fields of leadership, mental health, health, wellness, and research and development, medicine and treatments therefor and distribution of training materials in connection therewith; continuing education services, namely, providing live and on-line continuing education classes, seminars, conferences, workshops, trainings, and presentations in the field of leadership, mental health, health, wellness, and research and development, medicine and treatments therefor

The services in U.S. Registration No. 2794423 are "Business forecasting and sales analysis services" in Class 35.

The services in U.S. Registration No. 4627909 are "Computer systems integration services" in Class 42.

These services are related.

Specifically, companies that provide business forecasting and sales analysis commonly also provide business management consulting, incubation services, and classes in the field of leadership. See <https://www.rubinbrown.com/Services/business-advisory-services/data-assurance-and-analysis.aspx>; <https://www.rubinbrown.com/Services/business-advisory-services.aspx>; <https://www.rubinbrownadvisors.com/> (offering business advisory services, and financial advisory services under the same mark); <https://exigosalesandmarketing.com/smarketing/smarketing-analysis/>; <https://exigosalesandmarketing.com/smarketing/smarketing-consulting/>; <https://exigosalesandmarketing.com/smarketing/smarketing-training/> (offering business analysis services and courses in the field of marketing); <https://innovationconnector.com/services/> (offering sales analysis, business consulting, financial services, and training services).

Further, companies that provide computer systems integration commonly also provide business consulting and financial advisory services. See <https://www.affirma.com/consulting-services/technology-consulting/systems-integration-consulting>; <https://www.affirma.com/consulting-services/digital-consulting>; <https://www.affirma.com/consulting-services/strategy-consulting> (offering systems integration and business consulting); <https://www.reply.com/breed-reply/en/breed-reply-active-operational-investor> (offering systems integration, financial support, and business consulting); <https://uaoenterprises.com/index.php/services-items/item/23-analysis>; <https://uaoenterprises.com/index.php/services-items/item/19-integration>; https://uaoenterprises.com/index.php/services-items/item/18-business_intelligence (offering business advisory services and systems integration).

The attached evidence establishes that the services originate from the same sources under the same marks. Thus, applicant's and registrant's services are considered related for likelihood of confusion purposes. See, e.g., *In re Davey Prods. Pty Ltd.*, 92 USPQ2d 1198, 1202-04 (TTAB 2009); *In re Toshiba Med. Sys. Corp.*, 91 USPQ2d 1266, 1268-69, 1271-72 (TTAB 2009).

The examining attorney further notes that the marks are highly similar or are identical. Generally, the greater the degree of similarity between the applied-for mark and the registered mark, the lesser the degree of similarity between the services of the parties is required to support a finding of likelihood of confusion. *In re C.H. Hanson Co.*, 116 USPQ2d 1351, 1353 (TTAB 2015) (citing *In re Opus One Inc.*, 60 USPQ2d 1812, 1815 (TTAB 2001)); *In re House Beer, LLC*, 114 USPQ2d 1073, 1077 (TTAB 2015) (citing *In re Shell Oil Co.*, 992 F.2d 1204, 1206, 26 USPQ2d 1687, 1688 (Fed. Cir. 1993); *Time Warner Ent. Co. v. Jones*, 65 USPQ2d 1650, 1661 (TTAB 2002); *In re Opus One Inc.*, 60 USPQ2d at 1815); TMEP §1207.01(a).

Because the marks are confusingly similar and the services are related, there is a likelihood of confusion between the marks. Consequently, registration is refused pursuant to Section 2(d) of the Trademark Act.

Response to Section 2(d) Refusal - Likelihood of Confusion

Although applicant's mark has been refused registration, applicant may respond to the refusal by submitting evidence and arguments in support of registration.

REQUIREMENTS

If applicant responds to the refusal, applicant must also respond to the requirements set forth below.

IDENTIFICATION OF SERVICES AMENDMENTS REQUIRED

Particular wording in the Identification of Services is overly broad and indefinite and must be amended. See 37 C.F.R. §2.32(a)(6); TMEP §§1402.01, 1402.03. The specific issues are set forth below.

In this case, the overly-broad wording appears to encompass classes that are already a part of the application. However, if applicant adds wording in other Classes to the application, applicant must comply with all Multiple Class Application Requirements, including the payment or relevant fees.

Class 35

The wording "management consulting services" is overly broad and indefinite and must be amended. Specifically, type of management is unclear here and could encompass services such as "Business management consulting" in Class 35 or "Financial management" in Class 36. Therefore, applicant must clarify the nature of these services and classify them accordingly.

Class 36

The wording "Incubation services, namely, providing financing, advisory services, fundraising assistance, and introductions to start-ups and existing businesses and their leaders" is overly broad and indefinite and must be amended.

First for "providing financing" applicant must clarify the nature of the financing, e.g., "providing financing to emerging and start-up companies", etc.

Second, the "advisory" services are unclear and could encompass "business advisory services" in Class 35 or "financial advisory services" in Class 36. Applicant must clarify these services and classify them accordingly.

The wording "fundraising assistance" is unclear and the nature of the assistance must be clarified, e.g., "business fundraising for others", "consulting in the field of business fundraising", etc.

The wording "introductions to start-ups and existing businesses and their leaders" is overly broad and indefinite. Specifically, this appears to identify "business networking" which is properly in Class 35 and not in Class 36. Therefore, applicant must clarify these services and classify them accordingly.

Overall Identification

Applicant may adopt the following Identification, if accurate (wording in bold and italics indicates suggestions with notes about the wording in brackets, underlined wording highlights reclassified wording):

Class 35: Business organization and management consulting; *[specify type of management in Class 35, e.g., business]* management consulting services; new business venture development and formation consulting services; association services, namely, organizing an exclusive membership for leaders and

entrepreneurs and promoting the interests of members thereof; association services, namely, organizing a business network for entrepreneurs and leaders and promoting the interests of members thereof; Incubation services, namely, [specify type of advisory services in Class 35, e.g., business advisory services, and business networking in the nature of introductions to start-ups and existing businesses and their leaders]

Class 36: Incubation services, namely, providing financing, [specify type of advisory services in Class 36, e.g., financial] advisory services, fundraising assistance in the nature of [clarify services, e.g., business fundraising for others, consulting in the field of business fundraising], and introductions to start-ups and existing businesses and their leaders [delete or reclassify wording to Class 35]; investment advisory services; [specify type of management in Class 36, e.g., financial] management consulting services

Class 41: Arranging and conducting of classes, seminars, conferences, workshops, trainings, and presentations in the fields of leadership, mental health, health, wellness, research and development, and medicine and treatments therefor; educational services, namely, conducting classes, seminars, conferences, workshops, trainings, coaching services, and presentations in the fields of leadership, mental health, health, wellness, and research and development, medicine and treatments therefor and distribution of training materials in connection therewith; continuing education services, namely, providing live and on-line continuing education classes, seminars, conferences, workshops, trainings, and presentations in the field of leadership, mental health, health, wellness, and research and development, medicine and treatments therefor

Applicant may amend the identification to clarify or limit the services, but not to broaden or expand the services beyond those in the original application or as acceptably amended. See 37 C.F.R. §2.71(a); TMEP §1402.06. Generally, any deleted goods and/or services may not later be reinserted. See TMEP §1402.07(e).

For assistance with identifying and classifying goods and services in trademark applications, please see the USPTO's online searchable *[U.S. Acceptable Identification of Goods and Services Manual](#)*. See TMEP §1402.04.

RESPONSE GUIDELINES

Response guidelines. For this application to proceed, applicant must explicitly address each refusal and requirement in this Office action. For a refusal, applicant may provide written arguments and evidence against the refusal, and may have other response options if specified above. For a requirement, applicant should set forth the changes or statements. Please see “[Responding to Office Actions](#)” and the informational [video “Response to Office Action”](#) for more information and tips on responding.

Please call or email the assigned trademark examining attorney with questions about this Office action.

How to respond. [Click to file a response to this nonfinal Office action.](#)

/Alison Keeley/
Alison Keeley
(571) 272-4514
alison.keeley@uspto.gov

RESPONSE GUIDANCE

- **Missing the response deadline to this letter will cause the application to abandon.** The response must be received by the USPTO before midnight **Eastern Time** of the last day of the response period. TEAS maintenance or unforeseen circumstances could affect an applicant's ability to timely respond.
- **Responses signed by an unauthorized party** are not accepted and can **cause the application to abandon**. If applicant does not have an attorney, the response must be signed by the individual applicant, all joint applicants, or someone with legal authority to bind a juristic applicant. If applicant has an attorney, the response must be signed by the attorney.
- If needed, find contact information for the supervisor of the office or unit listed in the signature block.

(4) STANDARD CHARACTER MARK

FUTURIAN

Mark Punctuated

FUTURIAN

Translation

Goods/Services

- IC 042. US 100 101.G & S: Computer systems integration services. FIRST USE: 20060105. FIRST USE IN COMMERCE: 20060105

Mark Drawing Code

(4) STANDARD CHARACTER MARK

Design Code

Serial Number

86204801

Filing Date

20140226

Current Filing Basis

1A

Original Filing Basis

1A

Publication for Opposition Date

20140812

Registration Number

4627909

Date Registered

20141028

Owner

(REGISTRANT) Futurian Systems, Ltd. Jeremy Beck, a citizen of the United States and Beck Equity, a Texas corporation LIMITED PARTNERSHIP TEXAS Unit A1 1890 Lions Ridge Loop Vail COLORADO 81657

Priority Date

Disclaimer Statement

Description of Mark

Type of Mark

SERVICE MARK

Register

PRINCIPAL

Live Dead Indicator

LIVE

Attorney of Record

Jason R. Lee

(1) TYPED DRAWING

FUTURION

Mark Punctuated

FUTURION

Translation

Goods/Services

- IC 035. US 100 101 102.G & S: BUSINESS FORECASTING AND SALES ANALYSIS SERVICES.
FIRST USE: 19860000. FIRST USE IN COMMERCE: 19860000

Mark Drawing Code

(1) TYPED DRAWING

Design Code

Serial Number

76488171

Filing Date

20030207

Current Filing Basis

1A

Original Filing Basis

1A

Publication for Opposition Date

20030923

Registration Number

2794423

Date Registered

20031216

Owner

(REGISTRANT) FUTURION ASSOCIATES, INC. CORPORATION PENNSYLVANIA 2000 Ginoria Ct.
Export PENNSYLVANIA 15632

Priority Date

Disclaimer Statement

Description of Mark

Type of Mark

SERVICE MARK

Register

PRINCIPAL

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Scott W. Smilie

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future

1 of 2 **adjective**

future 'fyü-chər

1 : that is to be
specifically : existing after death
 doctrine of a *future* life
 — John Kenrick

2 : of, relating to, or constituting a verb tense expressive of time yet to come

3 : existing or occurring at a later time
 I met his *future* wife
 We cannot foretell *future* events.

future 2 of 2 **noun**

1 **a** : time that is to come
b : what is going to happen

2 : an expectation of advancement or progressive development

3 : something (such as a bulk commodity) bought for future acceptance or sold for future delivery → usually used in plural

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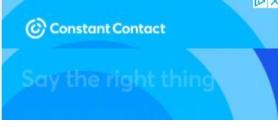
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We cannot predict *future* events.

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GIVE NOW

Noun

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- Kwame Christian, *Forbes*, 15 Aug. 2022

With male professional baseball players off to fight in World War II, these women had a unique opportunity to live out their dreams and pave the way for *future* generations of female athletes.

- Maggie Horton, *Country Living*, 12 Aug. 2022



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These example sentences are selected automatically from various online news sources to reflect current usage of the word 'future.' Views expressed in the examples do not represent the opinion of Merriam-Webster or its editors. Send us feedback.



Need COVID-19



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Word History

Etymology

Adjective and Noun

Middle English, from Anglo-French & Latin; Anglo-French, from Latin *futurus* about to be — more at [BE](#)

First Known Use

Adjective

14th century, in the meaning defined at [sense 1](#)

Noun

15th century, in the meaning defined at [sense 1a](#)

Time Traveler

The first known use of *future* was in the 14th century

[See more words from the same century](#)



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Phrases Containing *future*

[at a later/future date](#)

[future perfect](#)

[for future reference](#)

in/for the foreseeable future future tense future shock

mortgage the/one's future in the not too distant future in future

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world of difference.

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Articles Related to *future*



30 Ways to Tell the Future

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Future Farmer

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a world of difference.

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Kids Definition

future 1 of 2 adjective

fu·ture ('fyü-chər)

: coming after the present

| *future events*

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a world of difference.

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future 2 of 2 noun

1 : the period of time that is to come

| What will happen in the *future*?

2 : the chance of future success

| You have a bright *future*.

Legal Definition

future noun

fu·ture

: a contract traded on an exchange in which a party agrees to buy or sell a quantity of a bulk commodity (as soybeans) at a specified future date and at a set price → usually used in pl.

| Note: If the price of the commodity has gone up when the future date arrives, the buyer in the contract profits. If the price has gone down, the seller profits.

Inspired Gift can make
a world of difference.

More from Merriam-Webster on *future*

English: Translation of *future* for Spanish Speakers

Britannica English: Translation of *future* for Arabic Speakers

Britannica.com: Encyclopedia article about *future*

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WORDS AT PLAY



'Dunderhead' and Other 'Nicer' Ways to Say Stupid

As illustrated by some very smart pups



10 Words from Place Names

Bikini, bourbon, and badminton were places first



'Pride': The Word That Went From Vice to Strength

Do you take pride in Pride?



When Were Words First Used?

Look up any year to find out

ASK THE EDITORS

literally



Literally

How to use a word that (literally) drives some pe...

'All Intensive Purposes' or 'All Intents and Purposes'?

We're intent on clearing it up

Lay vs. Lie

Editor Emily Brewster clarifies the difference.

Hot Mess

"The public is a hot mess"

WORD GAMES



What Are You Wearing?

Roll up your sleeves and identify these garments

[TAKE THE QUIZ >](#)



Name That Animal: Volume 2

Can you tell a meerkat from a wombat?

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Can you spell these 10 commonly misspelled words?

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Spelling Bee Quiz

Can you outdo past winners of the National Spelli...

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For more information, please contact:

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CGMA
Partner & Solutions Leader
Data Assurance & Analysis Services Group
314.290.3324
brandon.loeschner@rubinbrown.com

Data analysis is the combination of skills and tools that enables compliance personnel and internal auditors to gain insight into business processes and transactions.

Data analysis is useful in audit planning, performance, and reporting. In the planning process, it can provide an in-depth insight into trends and attributes of the population not found through traditional audit approaches by looking at 100% of the data, rather than just a representative sample.

Data analysis also provides valuable insights to business leaders outside of the audit process by consolidating and linking decentralized data from different systems into a single analysis.

This analysis provides management insights into transactions, as well as customer, employee and vendor relationships, which they can use to proactively monitor risks across business operations and support benchmarking across functions.

What Can RubinBrown Do For You?

RubinBrown's Data Services team combines industry experience, functional specialists and state of the art audit and analysis tools, such as ACL, IDEA and SAS, to provide you with insight and a fresh perspective about your business, division, process or control environment.

Our analysts not only design audit tests, but also help management identify hidden risks, flag abnormal transactions and provide valuable insights into the business. RubinBrown Data Assurance & Analysis Services team can also provide you with automated end-to-end data analytic solutions.

Data Assurance & Analysis Services

- Computer audit techniques (with ACL and IDEA)
- Continuous auditing and/or monitoring solutions

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RubinBrown Names Steven Harris as

- Automated controls testing
- Business intelligence solutions (Business Analytics, KPIs, KRIs, KCIs)
- Cost recovery
- Data quality and integrity management for:
 - Integration and system consolidation/migration
 - Contract compliance (royalty, licensee, franchisee, service level)
- Forensic Investigations
- Customer, contract, billing, and vendor data integrity and quality checks
- Segregation of duties within and across ERPs

Financial Analysis Testing with Data Analysis

Sales Analysis

- Generate sales & profitability reports by sales representatives, product, etc.
- Recap product sales by region, customer, category, etc.
- Analyze sales trends by comparing current & previous periods
- Identify top dollar volumes by products, customers, sales reps, etc.
- Compare current sales to open receivables

Accounts Receivable

- Report & automatically age total receivables
- Determine carrying cost by comparing days in collection by customer
- Identify credit limit exceptions
- Generate summaries by customer, invoice, amounts, etc.
- Identify duplicate invoices, credits, or receipts
- Summarize client days to payment by customer, sales rep, region, etc.
- Identify credits taken beyond discount terms
- Look for lost revenue from unpaid carrying charges by client, etc.
- Determine average sales amounts by product, sales rep, region, etc.

Asset Management

- Compare book & tax depreciation & indicate variances
- Identify fully depreciated items & assets higher than replacement cost
- Recalculate expense & reserve amounts using replacement costs
- Compare useful lives of assets by category

Firm's Managing Partner

12/22/2021

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12/14/2021

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- Extract assets with useful lives or depreciation rates beyond set norms

Inventory

- Segregate variances from standard pricing in dollar amount order
- Identify obsolete inventory by stored turnover analysis
- Report on products in order of profitability
- Summarize & stratify turnover by stock item
- Analyze high value transactions
- Summarize stock on-hand by group, location, type, etc
- Look for differences between standard costs & actual costs
- Compare cost to retail price to look for pricing discrepancies
- Find products with zero quantities or zero prices

Accounts Payable

- Compare voucher or invoices posted against purchase order amounts
 - Identify vendor unit price variances by product
 - Find invoices without purchase orders
 - Look for distributions to suppliers not in suppliers master file
 - Identify invoices posted with duplicate purchase order numbers
 - Look for lost discounts not taken
- Payroll**
- Isolate entries against authorization records for new or terminated employees
 - Analyze costs for special pay, overtime, premiums, etc.
 - Look for changes in key payroll data, such as gross pay, hourly rates, salary amounts, exemptions, etc.
 - Compare employee tax identification numbers, phone numbers, & addresses to vendor information for payables to identify potential conflicts of interest

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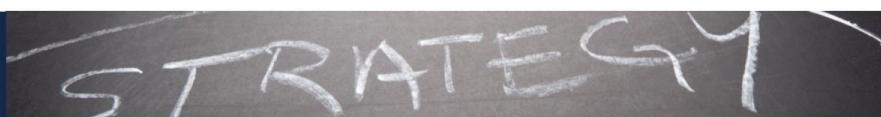
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Business Advisory Services



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Today's economic conditions are constantly changing as businesses try to grow while managing risks and complying with laws, regulations and internal policies.

RubinBrown's greatest asset is the 'thought leadership' of our seasoned professionals. We have directed and consulted with a wide variety of companies, ranging from Fortune 500 public companies to startup private companies.

Our talented professionals provide cost-effective, value-added solutions to improve the financial position and operations of your business. RubinBrown's Business Advisory Services team provides solutions-based services in the following areas.

Business Improvement Services

RubinBrown's Business Improvement Services focus on planning, improving and executing business strategies and processes with an objective view that aligns activities with the needs of your clients and stakeholders. Business Improvement is composed of two offerings:

Business Process Improvement: We focus on making business processes efficient and lean. We have several Lean Six Sigma Belts on our staff that lead teams of professionals with significant experience in process improvement. A typical project can lead to 50% improvement in time savings or capacity availability.

Business Intelligence: We organize your data and create monitoring mechanisms that help you effectively manage your business. When used in combination with Business Process Improvement, you will see concrete results that can be sustained.

Business Reorganization & Financial Restructuring Services

RubinBrown has extensive experience dealing with bankruptcy cases. We help troubled companies survive and continue to operate, negotiating with creditors and providing owners with return on their investment.

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In the event a company cannot withstand business difficulties, we help owners and creditors maximize liquidation proceeds, recovering as much as possible.

Through our reorganization services, we provide critical assistance with both in-court and out-of-court matters to companies that are in crisis, underperforming, or healthy companies with underperforming sectors. We have helped numerous clients stabilize their operational and financial performance.

Cyber Security Services

It's a matter of when, not if, you will be impacted by a cyber security incident or a breach. With the emergence of the cloud and growing engagement through mobile, social networks and remote workers IT and business processes need to adapt in order to meet new compliance requirements and general best practices. RubinBrown has a dedicated team specializing in cyber security services with services ranging from assessments, to cyber compliance and ongoing advisory support with the flexibility to adapt to each client's requirements.

Enterprise Risk Management Services

RubinBrown's experience has shown that the risk culture is so highly fragmented at many organizations that Board members, and the CEO, may find it hard to engage in a meaningful and informed analysis.

When properly implemented, Enterprise Risk Management (ERM) can be an extremely powerful tool for identifying and taking advantage of the risks facing your organization.

ERM supports value creation by enabling management to deal effectively with potential future events that create uncertainty. Effective ERM helps management respond in a manner that reduces the likelihood of downside outcomes and increases the upside.

Everyday, value is created, preserved or eroded by management decisions in all activities, from strategy setting to running day-to-day operations. RubinBrown will help your company manage risks to create a competitive advantage that increases stakeholder value.

Fraud & Forensics Services

RubinBrown's team of forensic experts are experienced in performing a wide range of fraud and forensic services. Our financial, operational and investigative experience helps organizations identify financial irregularities, analyze complex business issues and mitigate losses.

When corporations suspect a misappropriation of assets, fraudulent financial reporting or other misconduct, RubinBrown investigates to determine the existence and nature of the fraud as well as the perpetrator. We quantify the fraud losses and, where possible, help clients identify recovery options. We also work with our clients to identify fraud risk factors and recommend changes to strengthen internal controls to help prevent and deter fraud.

Information Technology Risk Services

As Information Technology (IT) is leveraged to continually improve business performance, the business risk IT represents increases.

Firms Managing Partner

12/22/2021

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Frequently Asked Cyber Security Questions

- We've been asked for a SOC report, what do we do now?
- We are acquiring a new entity, what do we need to do to evaluate technology and security prior to acquisition or integration?
- What should we do if our teams need help supporting the IT efforts for SOX or SOC requirements?
- We don't know what our security posture is?
- How can we test security for PCI, HIPAA, NIST for insurance premiums?

We help manage your IT risk so you can manage your business and transform technology into a competitive advantage. 

Trusted Reporting: SOC 1, SOC2, SOC3 and SOC for Cyber Security: Attestation for security, privacy, confidentiality, processing integrity and/or availability or for internal control over financial reporting. 

Cyber Security Consulting: Hands on assistance from prior military and CISO leaders to meet your protection and compliance needs.

IT Risk Assessment: Obtain the point of view you need to understand your IT risks in the context of the broader business risks, as a foundational step in formulating your strategy.

IT Audit/Internal Audit: We are here to help finance and IT groups before the internal or external auditors. We are also here to help as your internal auditors. Our top-down, risk-based approach to system and process controls will help you take this area of work off your plate.

IT Due Diligence: As part of our Mergers and Acquisition Services, you can select customized analyses focused on security, continuity and IT costs.

Third Party Risk Management: Providing you the team to assess the vendors/business partners throughout your supply chain for the technology compliance you depend on them for.

Automation Readiness and Implementation: Embedding the risk assurance into the bot development as well as testing the automated controls will ease you into this transformative business change.

Data Assurance & Analysis: Receive a fresh analysis with the latest tools for the transparency you need to run your business.

Information Technology Services

The IT Group, part of RubinBrown's Business Advisory Services, is a Microsoft Dynamics Partner, Sage Master Developer and Intuit Solution Provider. Our team of technology and business professionals delivers a comprehensive set of solutions for ERP and Retail needs.

 [Custom Implementation](#)

- System implementation
 - System integration
 - Report writing and analytics development
 - Retail point of sale (POS) implementation

RubinBrown is committed to providing leading edge products and services. To achieve this, our information technology professionals frequently participate in ongoing technical training and certifications.

Litigation Services

RubinBrown maintains a staff of professionals experienced in providing a comprehensive range of services to attorneys and their clients involved in a variety of litigation and dispute matters.

Our experts have experience providing services that encompass accounting malpractice, breaches, franchise/distributor disputes, intellectual property, lost profit quantification, product liability claims, and more.

Our involvement in litigation support engagements includes all phases of the dispute process, from pre-petition fact-finding through trial.

Mergers & Acquisitions Services

Our team of mergers and acquisitions experts focus on the entire life cycle of the transaction process for both buyers and sellers. Our services include:

- Acquisition and divestiture strategies
- Due diligence
- Integration services

From the initial thought of buying or selling to the critical post-closing and integration activities that must occur, our comprehensive approach maximizes the value of the transaction for our clients.

Risk Services

We provide guidance to management on the execution of cross-functional, data-driven approaches to risk management and internal audit services to evaluate existing enterprise risk management programs against global best practices.

RubinBrown's experience has shown that the risk culture at many organizations is so highly fragmented, board members and the CEO may find it hard to engage in a meaningful and informed analysis.

Our experienced team is adept at providing risk services consulting including project management, change management, enterprise risk assessment facilitation and sustainable program design.

Valuation Services

The Valuation professionals at RubinBrown are specialists that focus on the valuation of businesses and business interests as well as intangible assets.

We can assist with the identification and valuation of intangible assets acquired in a business combination, per Financial Accounting Standard Board's (FASB) ASC 805 - Business Combinations. We will also determine the fair value of goodwill, to test for potential impairment under ASC 350 - Goodwill and Other Intangible Assets.

Business Advisory News

02/01/2021

Focus on Cyber Security: SolarWinds Cyber Attack

The recent intrusion of high profile government systems via the SolarWinds Orion vulnerability has gained quite a bit of media attention and is likely to dominate the cyber security news cycle for the foreseeable future.

09/28/2020

Focus on Business Interruption: Update on COVID-19 Lawsuits

We have previously provided two updates on the business interruption landscape that has resulted from the COVID-19 pandemic. There were certain regulatory actions proposed several months ago, but those have been tabled or terminated.

04/27/2020

COVID-19: Identifying Black Swan Events

Black swan events rarely occur, defy predictability, and usually trigger extreme consequences.

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Phases of Portfolio Management

RubinBrown tailors our financial management services based around the major life phases that make up a financial plan. We have categorized these stages into four phases, which encompass the general path that we take during our working career, preparing for and then enjoying retirement.

[LEARN MORE >](#)

Value Proposition

RubinBrown Advisors help clients identify, prioritize and achieve their financial goals and objectives utilizing an experienced group of professionals that can integrate income taxes, estate taxes, financial planning, risk management and investment management needs, all in one place, throughout their lifetimes.

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Sales + Marketing = Smarketing

Get Started



SMARKETING ANALYSIS

Our Smarketing Analysis Process

Our analysis process looks at the four elements of smarketing. We review from bottom to top to understand the employee experience. Our goal is to create a sustainable plan to support your existing team and maintain the smarketing discipline as you grow.

How Your Teams Score

Our analysis looks at strengths in your sales and marketing processes. It also looks at the strengths of your individual members. We're looking for the signs of strong smarketing potential.

What Your Teams Say

During this we are also learning how your people communicate. Our team of sales and marketing professionals have

worked for a wide variety of industries, each with decades of experience in their field. So we get your people talking to find the areas that need common language.

Where They Can Grow

Marketing materials, sales reports, shadowing, data analysis; these all are taken into account to determine areas of growth. We can provide insight on the individual skills and define coaching or training opportunities.

Where They Get Support

Team leaders in both marketing and sales are crucial to this process. We review marketing and sales managers to identify challenges in interviewing, training and coaching.

Get Started

A smarketing analysis can give you a clear view on how to create alignment and grow sales. Contact us directly below or attend one of our Intro to Smarketing seminars to get to know us.

 (904) 479-6080

 info@exigosalles.com

Information Request

Your Name

Phone Number

Email

My Current Needs Are:

Sales

Submit

RECENT SALES AND MARKETING ARTICLES

5 Reasons You Need A Social Media Manager

Having a social media manager nowadays is a crucial part of your marketing strategy and growth as a business. Here's why: studies have shown that over a million people join social media a day. Whether that be Instagram, Facebook, Twitter, TikTok, or another platform. With so many people joining daily, your brand and business must continue to be a leading voice within the social media world. Investing in a social media manager can boost your marketing by doing the following.

3 Marketing Trends To Consider

The world of marketing is constantly changing. Which can make it overwhelming for businesses to figure out what is best [...]



The Most Marketable Thing is You

A common misconception in the marketing world is that you need to have the latest and greatest idea. While that can be beneficial, it's not always the secret sauce. If no one told you, let us be the first. The most marketable thing about your business is...wait for it – you!

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Sales + Marketing = Smarketing

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SMARKETING CONSULTING

Full-service Smarketing Consulting

"A lot of companies get caught up in the trap of a good economy. When sales are high, it can be easy to forget about investing in your people. The truth is this is the most important time to invest in your people. If you do, you get to take advantage of having the resources and the opportunities to train on. If you don't, you allow bad habits to breed. These bad habits will come back to bite you when the economy shifts."

– Christian

Full-service smarketing consulting means we act as a support system for your team. Through coaching and training we improve their confidence and perception, creating better work. Through our examinations, we can identify roadblocks or communication breakdowns that get in the way of selling.

We also support your leadership. We give them the support they need by helping calibrate their language and creating

We also support your leadership. We give them the support they need by helping calibrate their language and creating the materials and protocols to sustain your company now and in the future.

Get Started

Every project starts with a conversation. You can contact us direct or fill out the form below to attend one of our Intro to Smarketing seminars and get to know us.

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Get Started



SMARKETING TRAINING & COACHING

Smarketing processes are only as good as the people who keep them going. We help clients train new staff or coach existing staff when either the resources, workload or personnel are not in place to handle it internally.

Smarketing Training

Effective smarketing training works best with a combination of dedicated teaching-time and hands-on projects inside your organization or team. Our structured training includes customized workbooks and on-site training. We have professionals with experience in every role in your company. So the person training your staff speaks their language and understands their role.

Smarketing Coaching

Ongoing coaching is a key part of the long-term success of your team. Your team leader can train with us to manage this key role. We can also provide one-on-one coaching for special needs.

"Everyone needs a support system. Someone to talk to, someone to share with and someone who helps them make the best of every day."

- Christian

Give Your Team The Right Support

If your team needs immediate support, you can contact us directly. If you want to get to know us more, use the form below to sign up for one of our Intro to Smarketing seminars.

 (904) 479-6080

 info@exigosales.com

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Systems Integration Consulting Services

Affirma provides expert system integration solutions that consolidate your disparate systems to enhance visibility into your operations, increase employee productivity, minimize security risk, and reduce operational cost.

LEARN MORE

Cohesive System Integration Solutions

When your business has two or more systems that aren't syncing, we can help you integrate them for seamless and functional operation.

Affirma understands the frustration that comes from having disparate systems running your organization. Between not having a single source of truth for accurate reporting and analysis to the rise in operational costs, not having your systems communicate can put your company at a disadvantage.

As system integration experts, we are confident we can help you streamline your technology systems to deliver the best data-driven results for your company.

Let's say you have an e-commerce website and an inventory system that lives elsewhere. Wouldn't it make the day-to-day of your online shop easier to handle if they operated as one? We can integrate those platforms and help those systems communicate with each other, so you know what to sell at all times of the day. The same goes for any type of systems your company utilizes – with Affirma's systems integration services, your company data will live in one place instead of interspersed across platforms.



600

Employee WorldWide



20

Years in Business



98%

Customer Satisfaction Rate

Streamline Your Business Systems to Save Time and Resources

We have worked with various businesses on company-specific projects for documentation implementation, software, and IT support; migrating on-premises data into a company cloud interface, and creating custom platforms to help streamline their systems' integration process. It doesn't matter what kind of platform you may have – it's about knowing how data works and having that expertise in integration. Our team has that required knowledge, and we will collaborate with you to make your organization's every day a better day.

[READ MORE >](#)

Dependable Systems Integration Consultants

Work with Affirma's integration experts to give your company a better digital future.

Whether you need a specific integration platform created by our development team or have documentation and need your existing systems streamlined, we're ready to discuss the possibilities of system integration for your company. Our integration team has worked with project management tools, CRM platforms, e-commerce and inventory sites, data analytics software, and various other data-gathering tools while integrating company systems. It's about knowing how data works and having that expertise in integration; our team has that required knowledge.

If you're ready to make the move and give your company the functionality it needs in today's digital sphere, we would love to set up a free consultation to discuss the full scope of your business needs.

[LET'S CHAT >](#)



Our work



QuoteWizard: Automated & Streamlined...

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Northern CA Credit Union Finds Success with Salesforce

TECHNOLOGY



City of Seattle – Migrated Platform Success

TECHNOLOGY



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Xbox Ambassadors – Social Engagement and Membership

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Digital Marketing Consulting Services

Affirma offers a full suite of creative and technical digital marketing consulting services to help your company craft human connection through digital experiences by telling powerful stories, increasing qualified leads, and driving search profitability.

[TELL US ABOUT YOUR PROJECT](#)

Digital Consulting Services Offered

Our digital marketing consulting agency headquarters are in the Seattle area, but we offer a global presence and expertise. The Affirma difference is our ability to pull in a wide range of experts for any digital marketing project.

From PPC campaigns and ad copy to the development of a package of digital content offerings including motion graphics, video scripting, SEO, and social media—Affirma can help. Our digital marketing consulting services include:

- Marketing Automation
- Search Engine Optimization (SEO)
- Content Marketing
- Pay Per Click (PPC) Consulting
- Marketing Audits & Assessments
- Social Media Marketing
- UX / UI, Visual Design, Video Production & Branding



Marketing Automation

Bring the power and speed of automation to your marketing campaigns and operations. Our digital marketing agency can drive your implementation and set up of any of the major marketing automation platforms such as HubSpot, Pardot or Marketo.

We'll help you deliver campaigns with greater customization, segmentation and scale. Each part of our marketing automation consulting is crafted with optimizing and improving your team's workflows and operations.

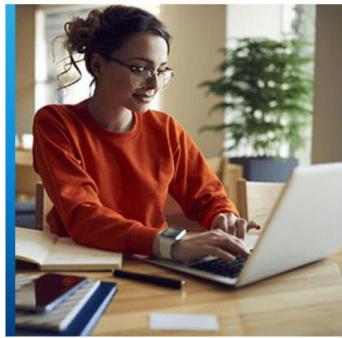
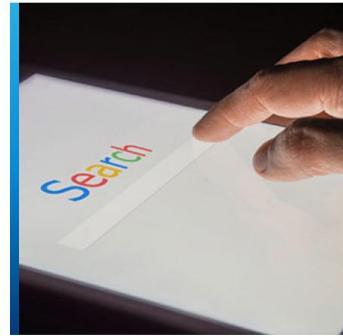
[LEARN MORE ABOUT MARKETING AUTOMATION](#)

Search Engine Optimization (SEO)

Competition on search engines continues to grow each year. Affirma's SEO consulting brings the power of design, development and content to deliver measurable gains and results in keyword positioning and rankings.

Whether you need a vulnerabilities assessment, implementation of tasks or accurate and responsive reporting, our teams are well-equipped to handle all your SEO needs.

[LEARN MORE ABOUT SEO CONSULTING](#)



Content Marketing

Good content marketing establishes audience trust, improves conversions, and generates leads. New creative and original content is what sets apart stale campaigns from ones that drive leads, grow revenue, and strengthen customer relationships.

At Affirma, our writers and marketers have the expertise and experience to develop content that captivates and converts your audience into loyal customers and evangelists.

[LEARN MORE ABOUT CONTENT MARKETING](#)

PPC Consulting

Enhance your PPC advertising campaigns and grow your revenue with Affirma's PPC consulting.



Our team provides insights on every stage of your conversion pipeline, from keyword research to landing page conversion. Whether you are a small business looking to grow your digital presence or a large business wanting to optimize your campaigns and targeting to increase profitability, Affirma can help.

Our team of PPC experts works tirelessly to ensure that your campaigns are converting at peak efficiency and optimization.

[LEARN MORE ABOUT PPC CONSULTING](#)



Marketing Audits and Assessments

You can't improve what you can't measure. Our marketing assessments and audits are built to deliver visibility in every aspect of your marketing activities. From SEO to technology stack audits, our team brings actionable insights and recommendations.

Our team of auditors all come from a strong background in various marketing departments, giving you an expert's view on your challenges and pain points.

[LEARN MORE ABOUT MARKETING ASSESSMENTS](#)

Social Media Marketing

Social media marketing is a crucial part of your business's marketing strategy especially when it comes to building lasting customer relationships, expanding your brand awareness, and even generating revenue.

Our professional social media marketing experts and consultants can help you develop a social media strategy, extend your customer outreach, and manage your social media advertising.



[LEARN MORE ABOUT SOCIAL MEDIA MARKETING](#)

**600**

Employees WorldWide

**20**

Years in Business

**98%**

Customer Satisfaction Rate

Visual and Creative Services

Delivering Creative Solutions and Delightful Experiences

Affirma offers digital consulting services to solve your biggest pain points. We are a world-class creative agency and full-service consulting firm and offer graphic and visual design, UX / UI, creative production, advertising services, branding, and more. Our creative team makes a point to understand your business to create tailored solutions to meet your goals and capture the essence of your brand in a powerful and compelling way that resonates with your customers.

Whether it's for your website, mobile app, or offline content, our dedicated team of designers, writers, video producers, and developers bring the best of current designs and trends to incite customer action.

[LEARN MORE ABOUT VISUAL DESIGN & CREATIVE SERVICES](#)



Digital Marketing Consulting Services

Strategic Search Marketing, Powered by Efficiency

Affirma specializes in organizing, optimizing, and managing search accounts with seamless, automated reporting and analytics to help clients achieve success in the search space. Whether you are looking for experienced, technical SEO expertise or winning SEM strategies to increase traffic, leads, and sales, our seasoned digital marketing consultants are here to help.

From SEO, PPC, and social media to content marketing, marketing automation solutions, visual design and more—we can help you reach your goals. Our digital marketing consulting services provide seamless implementation, strategic planning, budget tracking, project management, testing, and business insight to help clients not only grow their business but excel in their digital marketing space.

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Our work

A photograph of a multi-lane highway at sunset or sunrise, with several cars driving away from the viewer. The sky is orange and yellow. A small white box contains the text.

QuoteWizard: Automated & Streamlined...
TECHNOLOGY

A photograph of a woman with long red hair smiling. She is in an office environment with computer monitors and equipment visible in the background. A small white box contains the text.

Northern CA Credit Union Finds Success with Salesforce
TECHNOLOGY

A photograph of the Seattle skyline at sunset, featuring the Space Needle and surrounding buildings against a vibrant orange and pink sky. A small white box contains the text.

City of Seattle – Migrated Platform Success
TECHNOLOGY



Acumatica – HubSpot Support
DIGITAL



Xbox Ambassadors – Social Engagement and Membership
DIGITAL



Bernhard – IoT Data Collection and Analysis Platform
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Business Strategy and Transformation Services

Affirma delivers strategic consulting services to help businesses navigate challenges in the 21st-century workplace by offering creative, personalized approaches in process automation, project management, customer experience, and digital transformation

LET'S DISCUSS YOUR BUSINESS GOALS

Business Strategy Consulting That Delivers Results

Affirma's business strategy consultants analyze business practices and goals and make suggestions for company improvements. As experts in process automation, tools, digital strategy transformation, customer experience assessments, and project management, we devise holistic, out-of-the-box solutions to help businesses operate more effectively.

In today's dynamic business landscape, it is important to create a culture of innovation and focus on not only the customers' needs but also your unique workplace solutions. Affirma has been proudly helping customers with their business strategy needs for almost twenty years to help them operate more efficiently, cut costs, and drive profitability.



We offer specialized business strategy consulting in the following areas:

- Process Automation
- Change Management
- Digital Transformation
- Customer Experience (CX)
- Project Management Office (PMO)
- Business Process Outsourcing (BPO)
- Intranet and Extranet Design & Development

Customized Strategy Consulting and Planning Services

Business strategy, processes, and planning are critical in today's constantly evolving workplace. Affirma offers an informed, 3rd-party perspective to help your company learn about the latest technology trends, process automation tools, and workflows to help identify growth opportunities and solutions to help you decrease cost, improve quality, and reduce wasted resources. We also offer expert project management solutions that drive operational excellence and help you complete projects on time and on budget, to meet your business goals.

Strategic Project Management Consulting

If you are struggling to maintain consistency across your projects and processes, Affirma can help you develop a winning PMO solution.

We work with our clients to determine what functions your PMO should provide to ensure your project delivery is successful every time. Whether you need help establishing a new PMO, enhancing your current one, or outsourcing your PMO – we partner with you to meet your unique needs and set you up for project management success.

We offer integrated Project Management Office services and expertise in the following areas:

- *Audits*
- *Development*
- *Tools*
- *Methodology and Mentoring*
- *Metrics and Reporting*

Don't feel limited by these tools and platforms as we work with companies of all sizes and in all industries to offer PMO consulting solutions that meet your individual needs.

[LEARN MORE ABOUT PROJECT MANAGEMENT CONSULTING](#)

Efficient Process Automation Solutions

Affirma specializes in helping organizations eliminate manual processes and tasks to simplify processes, drive efficiency, and promote business growth and ROI.

If routine, out-of-date, or repetitive processes are eating up valuable employee work time and are increasing manual error and overhead cost, Affirma can help. We build custom process automation solutions using powerful technologies that help organizations utilize their resources more effectively.

Our process automation consultants can automate any repetitive process in your business. Whether those fall under customer service, sales and marketing, HR, or management, we can build a custom solution that follows compliance, saves time, and cuts operational costs.

Here can help your company work smarter and more efficiently with the following process automation solutions:

- Customer Relationship Management
- Custom Software Development and Tools
- Change Management
- Improved Reporting and Data Analytics

[LEARN MORE ABOUT PROCESS AUTOMATION SOLUTIONS](#)

Business Process Outsourcing (BPO)

It's imperative today for businesses to be focused on finding new ways to grow and stay competitive in the marketplace but it can be tricky to do when your employee's time is spent on tedious tasks and processes. Our business process outsourcing services can help alleviate these restrictions and allow you and your team to focus on the elements that will expand your business further.

[LEARN MORE ABOUT BPO](#)

Empowering Digital Transformation Services

Affirma offers digital transformation services to help companies of all sizes adopt newer, more efficient digital technology solutions to not only enhance performance but also become more efficient for more sustainable, long-term improvement.

Successful digital transformation involves bringing together and coordinating technology, data, process, and organizational change, and Affirma partners with you on the following services:

- Formulating a digital transformation strategy and roadmap
- Implementing digital technologies to diminish manual workload
- Building digital products to allow new business and channel growth
- Supporting these changes to people and processes

[LEARN MORE ABOUT DIGITAL TRANSFORMATION SERVICES](#)

Customer Experience Consulting Services

Affirma helps companies bridge the gap between the real world and the digital marketplace with successful customer experience solutions. Whether you need AI and automation services or an upgraded client portal, our personalized digital customer experience solutions help you evolve with your customers and improve modern workplace solutions.

Our expert customer experience consultants can help you with the following services:

- CX Design and Marketing
- CX Engineering and Development
- Modern Workplace Synchronization
- AI and Automation Solutions
- Strategy Implementation
- Technical Troubleshooting

[LEARN MORE ABOUT CUSTOMER EXPERIENCE SOLUTIONS](#)



600

Employees WorldWide



20

Years in Business



98%

Customer Satisfaction Rate

Get a Custom Strategy Consultation



If you would like assistance bringing your process automation, project management, digital transformation, and customer experience, we are here to help.

The world is shifting through digitization and technology and competition is getting fiercer. Many businesses are lacking either awareness, expertise, or the manpower to complete their digital transformation, which is where Affirma can help.

As a global partner with wide industry experience, Affirma is built around customer satisfaction and will do what it takes to exceed your expectations from start to finish. We foster and deepen our relationships with new and long-standing customers even after the project ends because we believe satisfaction and connection is the lifeblood of a sustainable consulting business.

If you're ready to connect and upgrade your company's customer experience solutions, we would love to set up a free consultation to discover the possibilities. Contact us today for your free consultation and a free information packet.

[LEARN MORE](#)



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OUR MODEL IN ACTION

"Breed Reply has been instrumental in the growth of RazorSecure. They have positively contributed across the business, helping us make better decisions and keeping us focused on growth."

ALEX COWAN, CEO *RazorSecure*

Breed Reply is an investor taking a unique approach to funding startups and early stage companies, focusing on the internet of things. We help investees to launch successfully and achieve rapid, profitable growth by applying an active operational investment model.

OUR MODEL



IDENTIFY

We seek out the most promising early stage IoT companies with strong teams, ideas and market potential from across Europe



NURTURE

We deliver a substantial cash investment, plus a bespoke 12-month support contract that helps our investees build capability, avoid pitfalls and accelerate success.



SCALE

We leverage our networks to give our investee companies a head start in their plans to launch, to scale and to secure next round funding.

WHY CHOOSE BREED REPLY?

We have a unique approach delivering not only funding, but also a bespoke set of "hands on" operational support services for twelve months to help rapidly grow and scale our portfolio.

RAPID & SIGNIFICANT INVESTMENT

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STRATEGIC & FINANCIAL SUPPORT

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TECH & COMMERCIAL EXPERTISE

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BREED REPLY

NEWS & COMMUNICATIONS

BREED REPLY

PORTFOLIO

WE CURRENTLY HAVE 17 COMPANIES WITHIN THE PORTFOLIO AND FOUR EXITS IN THE FOLLOWING SECTORS:

Industrial IoT, Health & Wellbeing, Smart Buildings & Cities, Platform Infrastructure and Cyber Security

DISCOVER OUR PORTFOLIO OF COMPANIES



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FAQS

WHAT ARE YOUR OBJECTIVES?

We want to select the smartest teams working on IoT enabled businesses, helping them grow with intensive support for the first twelve months.

HOW DO YOU SELECT COMPANIES TO INVEST IN?

We pay special attention to the quality of the team, the size and growth of the target market.

FOR FURTHER INFORMATION, CLICK HERE!

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BUSINESS ANALYSIS & PLANNING



Business Analysis is a formalized, disciplined process for identifying, articulating and facilitating a change needed to solve a business problem or address a business opportunity.

Today, organizations face a business environment that is very volatile and constantly undergoing change. Change can come from anywhere: the business environment, competition, legislation, customer demographics, and so on. To survive, organizations must respond to changes quickly and efficiently or risk dire consequences.

In order to effectively respond to change, organizations require the ability to identify and adapt to change. This includes capabilities such as:

- Identifying and analyzing the change (what happened?).

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- Technology Planning & Implementation
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- Web & Mobile App Development
- Project & Program Management
- View All

Vertical Segments

- Charter Schools & K-12 Education
- Law Firms
- Construction & Property Management
- Small & Medium Business

- Identifying the real problem or opportunity (so what's the real problem?);
- Discovering and documenting the current state (where are we now?);
- Identifying the desired state (where do we want to be?);
- Developing one or more solutions (what are our options?);
- Selecting and validating the best solution (what is the best option for us now?); and
- Identifying the gaps and road map (how do we get there?).

The UAO framework for Business Analysis has been optimized for Small to Medium Enterprises clients and is

- Efficient;
- Repeatable and Flexible; and
- Delivers to a high quality standard.

Sample deliverables from our Business Analysis engagement(s) include Business Cases to demonstrate the ROI on specific courses of actions or implementations of specific solutions, As-Is and To-Be Process Workflows, Comprehensive Business, Functional & Technical Requirements, Recommendations on courses of actions/solutions etc. These deliverables can exist independently or serve as inputs to subsequent UAO engagements.

Contact Us today to determine if a UAO Business Analysis Engagement is right for you.

More in this category: [« Strategy Development Process Development & Re-engineering »](#)

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BUSINESS & SYSTEMS INTEGRATION



Business & Systems Integration is a key factor in the operations, strategy, and competitive advantage of major corporations and organizations in a wide variety of sectors.

In the past, systems integration was confined to a technical and operations task. Today however, systems integration is a strategic task that pervades business management not only at the technical level but also at the management and strategic levels.

In an organization that doesn't have the business processes integrated with its systems, you typically have several disparate systems responsible for various functions which are performed in their separate silos. E.g. your order processing, invoicing, expense approvals, and fulfillment all going on without the appropriate level of collaboration with each other. The absence of a well integrated environment creates several business challenges including:

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Wasted Employee Productivity - From redundancy of efforts and manual processing of tasks that could be completed automatically. Lack of Real time Visibility, and the potential for increased customer churn!

Conversely a well integrated organization (regardless of the method of integration) provides many benefits including:

- process efficiency,
- dramatically improved visibility,
- significant IT time and Cost savings,
- accelerated growth and
- user-driven innovation (to name a few)

The UAO team is well experienced in facilitating business and systems integration engagements for our clients, and are able to help you with this issue. Contact us today to take the next step.

More in this category [« Technology Planning & Implementation Business Intelligence »](#)

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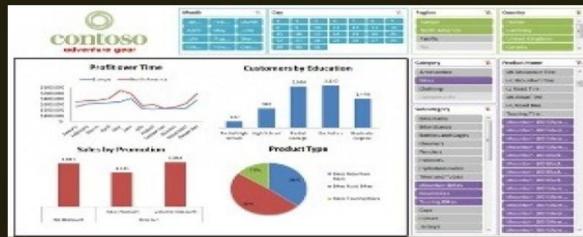
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BUSINESS INTELLIGENCE



Companies continuously create data whether they store it in flat files, spreadsheets or databases. This data is extremely valuable to your business or organization.

It's more than just a record of what was sold yesterday, last week or last month. It should be used to look at sales trends in order to plan marketing campaigns or to decide what resources to allocate to specific sales teams. It should be used to analyse market trends to ensure that your products are viable in today's marketplace. It should be used to plan for future expansion of your business. It should be used to analyse customer behaviour. The bottom line is that your data should be used to maximize revenue and increase profit.

All companies produce reports from the data they collect from their business activities. Every manager has a manager who needs reports unless you're the CEO in which case you just need reports.

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Some important questions you need to ask are:

1. How much resources (i.e. people, time, dollars) does it take to produce these reports?
2. Am I sure that the data in these reports is accurate?
3. Am I concerned with the security of these reports?
4. Am I receiving these reports in a timely manner?

If the answers to these questions are too much, no, yes, and no then you need a Business intelligence solution. Contact us today to help you with the proper implementation of the right solution, so you can start getting the actionable information that you need from all your data.

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United States Patent and Trademark Office (USPTO)

USPTO OFFICIAL NOTICE

Office Action (Official Letter) has issued
on August 23, 2022 for
U.S. Trademark Application Serial No. 97120866

A USPTO examining attorney has reviewed your trademark application and issued an Office action. You must respond to this Office action in order to avoid your application abandoning. Follow the steps below.

- (1) [**Read the Office action.**](#) This email is NOT the Office action.
- (2) **Respond to the Office action by the deadline** using the Trademark Electronic Application System (TEAS). Your response must be received by the USPTO on or before 11:59 p.m. **Eastern Time** of the last day of the response period. Otherwise, your application will be [abandoned](#). See the Office action itself regarding how to respond.
- (3) **Direct general questions** about using USPTO electronic forms, the USPTO [website](#), the application process, the status of your application, and whether there are outstanding deadlines to the [Trademark Assistance Center \(TAC\)](#).

After reading the Office action, address any question(s) regarding the specific content to the USPTO examining attorney identified in the Office action.

GENERAL GUIDANCE

- [**Check the status of your application periodically**](#) in the [Trademark Status & Document Retrieval \(TSDR\)](#) database to avoid missing critical deadlines.
- [**Update your correspondence email address**](#) to ensure you receive important USPTO notices about your application.
- [**Beware of trademark-related scams**](#). Protect yourself from people and companies that may try to take financial advantage of you. Private companies may call you and pretend to be the USPTO or may send you communications that resemble official USPTO documents to trick you. We will never request your credit card number or social security number over the phone. And all official USPTO correspondence will only be emailed from the domain “@uspto.gov.” Verify the correspondence originated from us by using your Serial Number in our database, [TSDR](#), to confirm that it appears under the “Documents” tab, or contact the [Trademark Assistance Center](#).

- **Hiring a U.S.-licensed attorney.** If you do not have an attorney and are not required to have one under the trademark rules, we encourage you to hire a U.S.-licensed attorney specializing in trademark law to help guide you through the registration process. The USPTO examining attorney is not your attorney and cannot give you legal advice, but rather works for and represents the USPTO in trademark matters.

Note To The File

Serial Number: 97120866

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Date: 08/23/2022 1:05 pm

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Statistics for Case 97120866						
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Session started 08/23/2022 9:53 am

Session ended 08/23/2022 1:01 pm

Total search duration 16.00

Session duration 3 hours 8 minutes 49 seconds

Adjacency Level 1

Near Level 1