



Experience Success.



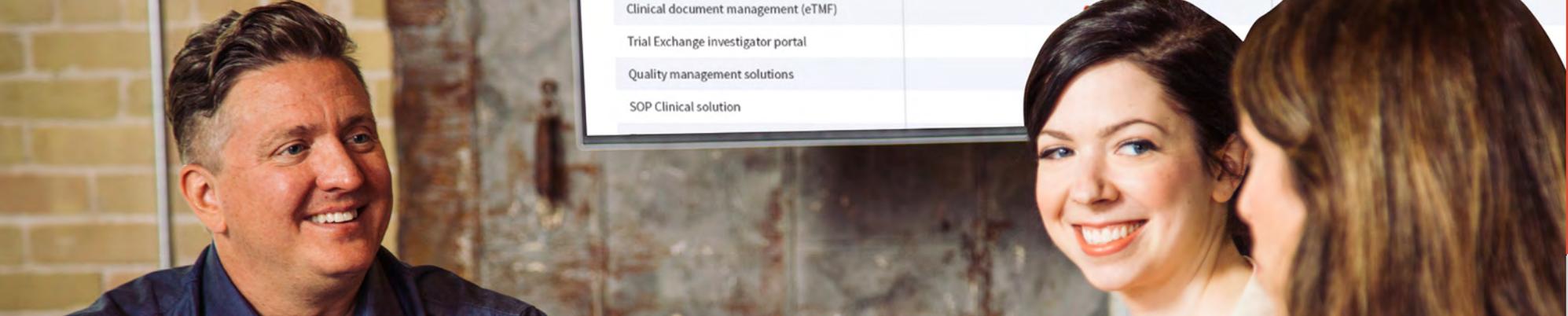
Welcome to Aurea

As a new Aurea client, you probably have questions about who we are, what changes you can expect, and what this acquisition means for your technology investments.

To help answer them, we've taken the most commonly asked questions from new clients like you and compiled them into this guidebook.

We hope you find it helpful as we work to make your transition as smooth as possible.

We truly look forward to serving you, and to earning your trust, loyalty, and partnership.



We're the technology behind some of the world's greatest customer experiences

At Aurea, we're a different kind of software company. We build high quality solutions and acquire companies with great products and clients. With Artemis, we'll apply our proven transformation process to deliver the business outcomes you demand.

Our entire model is built around your success. It's a simple and highly effective three-step process:

Step 1: Acquire and partner

Once we acquire a new company, we work tirelessly to earn your trust – partnering with you to create a valuable new relationship centered on your success.

Step 2: Strengthen for success

Next, we make major improvements to product quality and dependability that form a foundation for adding new value and features to your existing investments.

Step 3: Innovate and Grow

Finally, we invest deeply in modern, forward looking architecture to drive massive improvements in speed, ease-of-use, mobility, and more.



Top questions from new Aurea clients

How big is Aurea?

Today, Aurea has over 1,500 employees and 4,000 clients across North America, Europe, and Asia – and we’re rapidly expanding each year, adding new clients, teams, and offerings.

Where are you physically located, and do you have global locations?

We’re headquartered in Austin, TX, where we’ve been for nearly 30 years – and have a presence in most of the major cities where we do business in North America and Europe.

Why is Aurea not known by analysts?

Analysts help companies evaluate software vendors. Since our primary focus hasn’t been new customer acquisition – and our existing clients can evaluate our performance easily by looking inside their own organizations – we have historically made the decision to reinvest these financial resources in our clients.

Where can I view your financials?

As a closely-held private company, Aurea does not share financial information publicly. But we’re happy to talk with you directly to answer any questions you have about our financial model and investors – simply [reach out to your Account Executive](#) to schedule a discussion anytime.



We put our existing clients first

Our name isn’t the most well-known in the business – and that’s by design. While other software companies invest heavily in advertising, marketing, and public relations, we prefer to invest our dollars instead toward product development, engineering, and professional services that deliver more value to you.

By spending less money on traditional marketing, we’re also able to create innovative programs for our clients like [Aurea Prime](#), which gives you free access to nearly our entire product portfolio. Be sure to ask your Account Executive about how to take advantage of Aurea Prime.

We’re financially strong – and backed by the best in the business

Aurea is funded by private investor ESW Capital, one of the largest privately held software operators in the world. In fact, ESW Capital and Aurea are among the most profitable and fastest growing companies in the category, and we’re proud of the financial health we’ve maintained by delivering success to our clients.



Your dedicated team

In the coming weeks, you will meet with our management team and your designated sales and support representatives. To ensure your smooth transition to the Aurea family, our teams have roles aligned to your needs.

We're excited to build upon the award-winning solutions offered by Artemis. At the same time, we plan to scale the customer support experience using Aurea's proven service request model.

Your team is typically comprised of:

An **Account Executive**, who works closely with your Renewal Manager to ensure you are aware of valuable offers, solutions, and services that can benefit your business.

A **Renewal Manager**, who serves as your primary sales contact. At Aurea, Renewal Managers are responsible for helping you through the entire renewal process, and are your go-to for all contract and renewal questions.

Products & Innovation

Our goal is 100% client success with every Aurea product. To get there, we invest heavily from day one to stabilize and revitalize the products you depend on, adding significant new value to your original investment. Our approach adds value in two ways:

1. **Continuing to evolve the products you already have.** We focus on the core use cases of value that drove your initial purchase decision for the product – improving quality, fixing bugs, and delivering selective enhancements to strengthen the value you receive.
2. **Accelerating innovation, driven around your needs.** Solutions are designed to deliver 10-100x performance improvements, enhanced scalability, premium U/I and mobile experiences, and more.

Sales & Contracts

We want to ensure you experience no disruption during your transition. Your current contract will stay as it is.



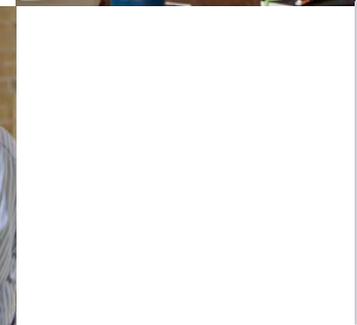
ABOUT AUREA



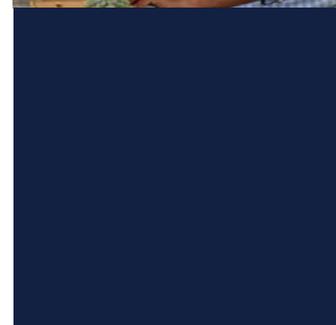
WHAT TO EXPECT



CLIENT SUCCESS



SUPPORT



CONTACT

Here's what you can expect from a roadmap perspective

Your products will continue their existing lifecycle

We're committed to continuing our investment in the products you depend on. Naturally, we end support for older versions of products where there is an upgrade path to a later (or current) version. This ensures clients can receive the latest fixes and enhancements, which we add to the latest versions.

You will see new investment, and new benefits

We frequently make new investments in the products we acquire, to satisfy both client and Aurea objectives. Products receive continual maintenance and core enhancements focused on the original use cases. At the same time, we invest in new innovation, where we focus on adding new excellence in performance, UI/UX, cloud, mobile, and analytics.

You will likely see some roadmap changes, though

When we acquire new products, they aren't always on the optimal development track to deliver the most value possible to your business. In response, we occasionally make updates and enhancements to your product roadmaps — keeping you fully informed throughout the process.

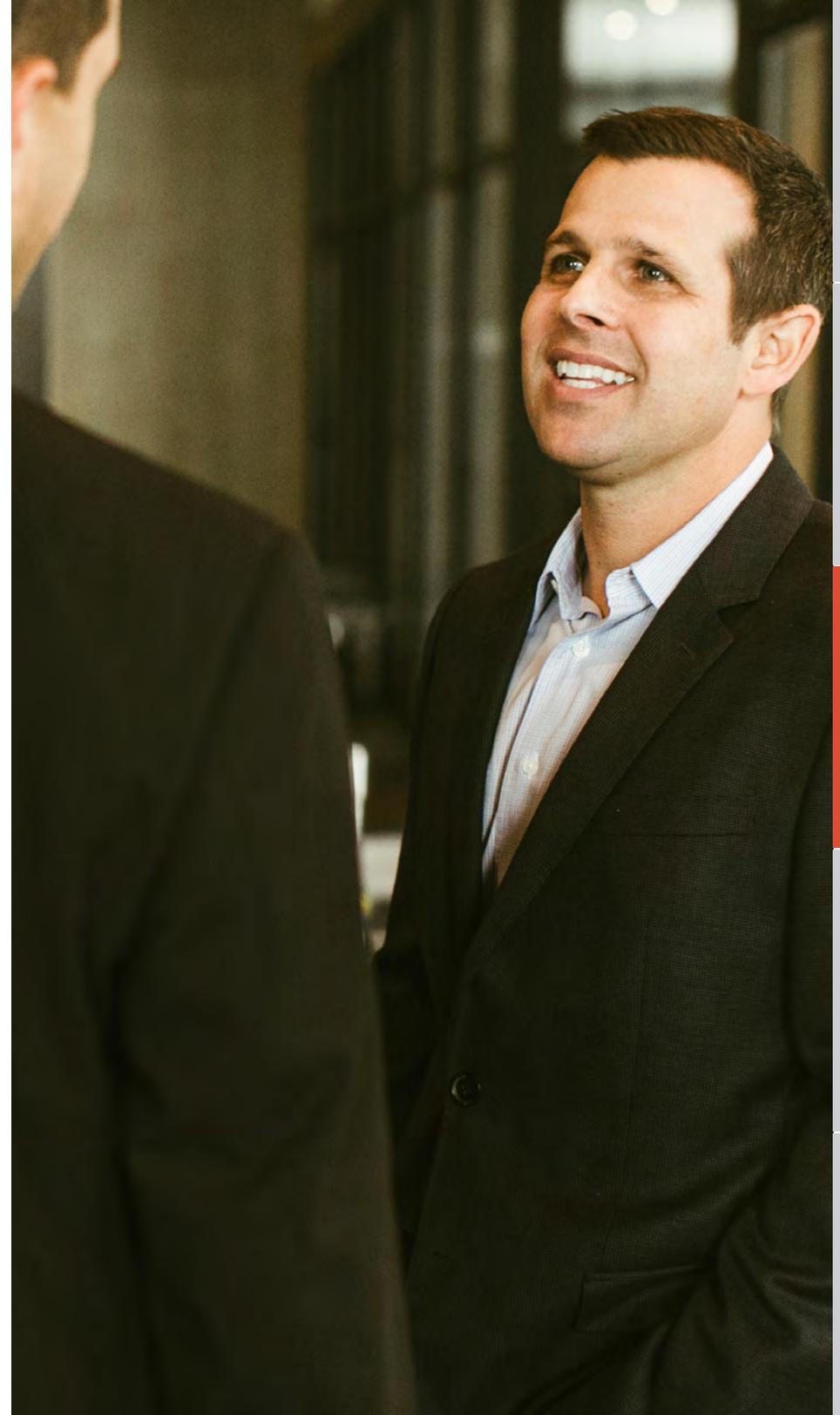
You will enjoy regular product updates

Most of our on-premise products have a quarterly release cycle for minor releases — with one major release per year.

Our SAAS based solutions enjoy a more frequent cadence of ongoing continuous improvement.

Your ideas drive our innovations

If an enhancement request will provide significant value to a large group of clients, we may add it to the roadmap. Enhancements that are not broadly applicable to our client base are great candidates for Aurea Professional Services.



"... Aurea set out to raise the bar. The mark has been hit."

- PENN MUTUAL



"(With Aurea) . . . We are producing double the volume in half the time, at lower cost and with greater quality."

- FREEDOM MORTGAGE



"(With Aurea) . . . We have the right skill set, and the right strategic partner to achieve our goals."

- BRITISH AIRWAYS



Our mission: 100% client success

At Aurea, our clients will never have to settle for "satisfied." We hold ourselves to a wildly higher bar – 100% success for every client. Here's the huge difference: Satisfaction is about simply meeting expectations, but success is about delivering the business outcome we promised – like increasing margin, improving client retention, or cutting time to resolution in half. Our program is simple: You define what you need to achieve, and we stay on track until you get there.

Aurea Client Success Program

In the coming weeks, we'll pair you with a dedicated Aurea Executive as part of our Client Success Program. Twice a year, we will meet to ensure executive alignment, validate our action plan, and confirm that we are delivering against your long-term goals for success.

At each meeting, your Aurea Executive sponsor will structure the call around:

YOUR SUCCESS

We'll hear from you whether you are successful today with Aurea – and review what we have done in the last 6 months to help you accomplish your goals.

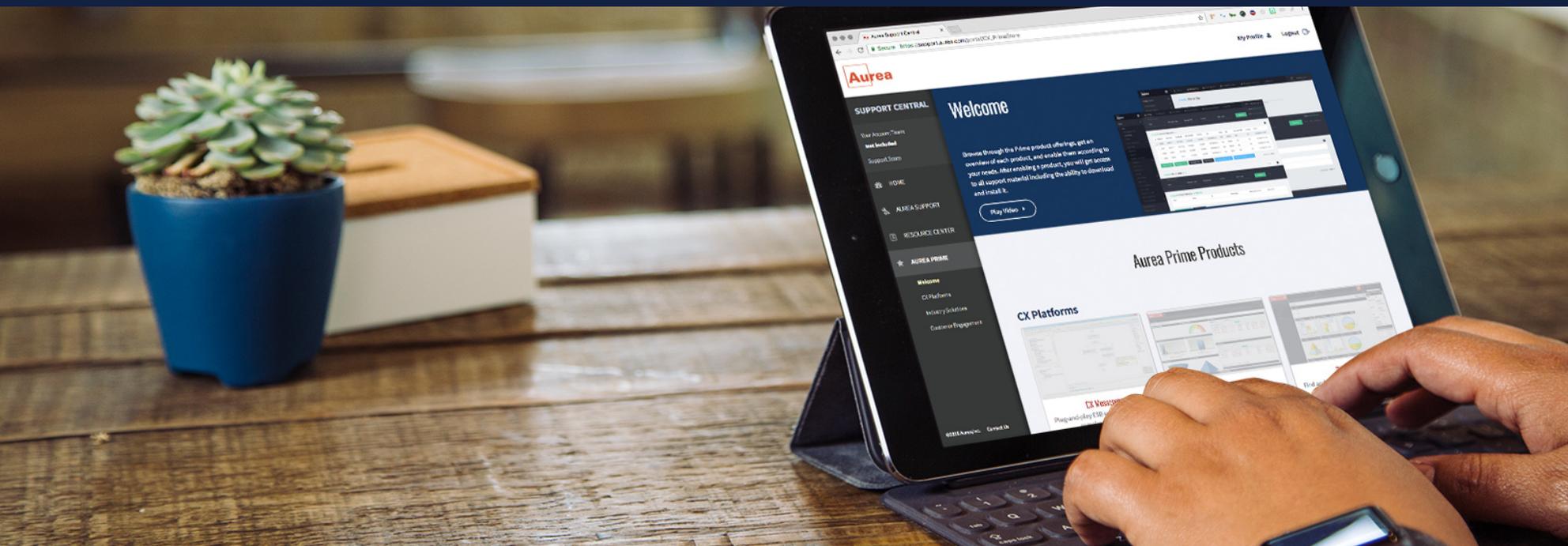
YOUR FEEDBACK

We'll ensure we remain in alignment with your most critical business goals, and hear candid firsthand feedback on our partnership with you.

OUR PLAN OF ACTION

Together, we'll identify the best priorities and working plan for ensuring your success over the next 6 months.

Request your own Client Success Meeting »



Support

We will work aggressively to ensure a seamless support transition, integrating key resources from Artemis and continuing the strengths provided by experts you rely on while leveraging the best of Aurea systems and processes.

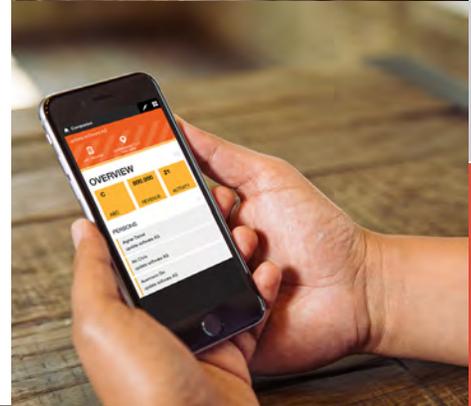
Coming mid-July, a new customer portal will be released. Current Customer Support users will be contacted directly with login credentials and instructions for using the new portal.

Leverage award-winning customer support

You can expect dedicated support with content and resources available on [AureaWorks](#). As we grow and integrate, you will enjoy the benefits of Aurea's expanded support offering.

We welcome your feedback

With each interaction, we encourage your candid and honest feedback. Our support team is measured on how well we are meeting your needs and expectations — and it's the most important metric we track.



Have a question or need assistance? We're here to help.

To ensure the fastest response, please contact:

Sales:

For questions related to your agreement including renewals, additional services or products, and pricing

[Connect with us »](#)

Support:

To open tickets, check ticket status, or inquire about product performance

[Visit AureaWorks »](#)



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