

TrueLynk Platform

A Preview of 50+ Capabilities



True Relationships. Real Results.



AI-Curated Relationships

With LinkedIn uploads, relationships are auto-classified and can surface approved matches at scale.

The screenshot displays the TrueLink 'Connections' interface. The sidebar on the left includes sections for 'Introductions', 'Company Network', 'My Network', 'Tools', and 'Account'. The main area shows a table of connections with columns for 'Share Company', 'Company Name', 'First Name', 'Last Name', 'Role', and 'Relationship'. A blue callout box highlights key features: 'Review and adjust Relationship Ratings', 'Control what becomes visible', and 'Relevant matches surface based on settings'. The bottom of the interface shows pagination controls indicating 24 items per page and 1-24 of 373 total items.

	Share Company	Company Name	First Name ↑	Last Name	Role	Relationship
☐		Luminary Catalyst LLC ✓	Aaron	Nelson	Digital Marketing Manager - Max Factor, Sally Hansen, Calvin Klein, Marc Jacobs	Good
☐		Louis Vuitton ✓	Aaron	Edwards	CEO + Board Member	Good
☐		Lilly Pulitzer ✓	Aaron	Reyes	Founder & Lead Origin Architect — The Omega Origin™	Indirect
☐		Glencoe High School Options	Adam	Howard	Regional Human Resources Manager	Great
☐		Hannaford: Online Grocery Delive... ✓	Adam	Kim	Head of Retail & Network Development	Connected AI*
☐		Goodyear ✓	Adam	Eastwood	Manufacturing Technician	Connected AI*
☐		Office Depot ✓	Adele	Rowe	Category Ops Analyst	Good
☐		Menards ✓	Adeline	Crayton	Operations Coordinator	Know
☐		Oracle ✓	Aiden	Lockwood	Solutions Consultant	Know AI*
☐		Target ✓	Ainsley	Marlin	Merchandising Support Analyst	Know AI*
			Alexander	Clark	District Manager	Connected
			Alexander	Ortiz	Capital Raising Associate	Indirect AI*
			Alice	Griffin	Inventory Analyst	Know AI*
☐		Tesla ✓	Alina	Westcott	Production Quality Technician	Know AI*

Collaborative Lists

Build better target lists together by combining company priorities with relationship knowledge.



Lists • Retail Prospects

Clever Cloud

M. D.

Introductions

Active

Targets

Leads

Lists

Company Network

Network Members

Campaigns

My Network

Connections

Companies

My Lists

Tools

Messaging

Action Items

Email Templates

Account

Company Profile

Users

Name

Retail Prospects

Shared By Network Member
Sofia Lang

Search

Actions

Add to List

	Name	Url	Status	Relationship	Priority
☐	 Agency, Inc. 	agency.inc 		Know	Add to Targets
☐	 Alo Yoga 	aloyoga.com 		Connected	Add to Targets
☐	 Bloomingdale's 	bloomingdales.com 		Connected	Add to Targets
☐	 Gap 	gapinc.com 		Indirect	Add to Targets
☐	 L.L.Bean 	llbean.com 		Great	Add to Targets
☐	 Macy's 	macys.com 		Great	Add to Targets
☐	 Old Navy 	oldnavy.gap.com 		Connected	Add to Targets
☐	 PepsiCo 	pepsico.com 		Connected	Add to Targets
☐	 Target 	target.com 		Connected	Add to Targets
☐	 ZARA USA 	zara.com 	Target	Connected	Add to Targets

Items per page: 50 1-10 of 10

- Advisors & Members can suggest companies
- Both sides can add, comment and prioritize
- Move the strongest fits into Targets

Know Anyone Here? Campaigns

Keep your network engaged with simple requests around companies you want to reach.

Targets (Requests) • Request Details

Clever Cloud

1

M. D.

Introductions

Active

Targets

Leads

Lists

Company Network

Network Members

Campaigns

My Network

Connections

Companies

My Lists

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Company Profile

Users

Clever Cloud

Campaign name

Know Anyone Here - Fall Drive

Sent date

Aug 11

Tell us who you know — or if you don't know anyone — within these targeted companies.

Company	Your Response	Relationship Rating	Relationship Details	Shared Details
 Activision Blizzard, Inc.	Shared Know Someone May Know Someone Don't Know Anyone	Know		
 Alo Yoga	Not Shared Know Someone May Know Someone Don't Know Anyone	Know		
 ba&sh	Know Someone May Know Someone Don't Know Anyone	—		—
 Hannaford	Shared Know Someone May Know Someone Don't Know Anyone	—		
 Jabra	Know Someone May Know Someone Don't Know Anyone	—		—
 PepsiCo	Shared Know Someone May Know Someone Don't Know Anyone	Connected		
 Ralph Lauren Corporation	Know Someone May Know Someone Don't Know Anyone	—		—

- Quickly indicate if you know someone
- Add relationship details when relevant
- Everything stays connected in one flow

Find the Best Introduction Path

View potential introduction paths and explore relationship details

Introductions

Active

Targets

Leads

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Network Members

Campaigns

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Target Introductions

Clever Cloud

M. D.

Targets

Approvals

Know Anyone Here

L.L.Bean	L.L.Bean	4 Intro Paths	1 Great	1 Good	0 Know	0 Indirect	2 Connected	0	3	
Member / Advisor	Relationship	Relationship Details	Last Message	Notes	Messages	Star	Last Activity			
Elena Chen	Senior Advisor, Digital Operations	Good	Requested	Hi Elena Che...	1		Aug 28 11:52 AM			
Marcus Duarte	Principal Advisor, AI Strategy	Connected	Requested	Hi Marcus D...	1		Aug 26 1:17 PM			
Sofia Lang	Partner, Product Advisory	Great	Requested	Hi Sofia Lan...	1		Aug 20 7:26 AM			
Noah Patel	Cloud Strategy Consultant	Connected	-							
alo	Alo Yoga	1 Intro Path	0 Great	0 Good	0 Know	0 Indirect	1 Connected	0	0	
Activision Blizzard, Inc.		2 Intro Paths	0 Great	1 Good	1 Know	0 Indirect	0 Connected	0	0	
Valentino		1 Intro Path	0 Great	0 Good	0 Know	0 Indirect	1 Connected	0	1	
Tory Burch		1 Intro Path	0 Great	0 Good	0 Know	0 Indirect	1 Connected	0	0	
RetailClub		1 Intro Path	0 Great	0 Good	0 Know	0 Indirect	1 Connected	0	0	
J.Crew		2 Intro Paths	0 Great	0 Good	1 Know	1 Indirect	0 Connected	0	1	
Allbirds		2 Intro Paths	0 Great	0 Good	1 Know	0 Indirect	1 Connected	0	0	
Apple		4 Intro Paths	0 Great	0 Good	1 Know	0 Indirect	3 Connected	0	3	

Elena Chen

Senior Advisor, Digital Operations

Good

View Profile

Send to Approval

Relationship Details

Notes

Requested

Aug 28, 2026

Messages

Aug 28 11:52 AM

Hi Elena Chen,
We see a potential fit and are interested in exploring your relationship(s) at L.L.Bean.
-Clever Cloud

Items per page: 50

1-9 of 9

Type a message...

Compare Relationship Ratings

Explore potential introduction paths

Request details to explore if a potential fit

Create & Customize Engagement Campaigns

Create branded campaigns that make it easy for Members to engage and participate.



Campaigns • Campaign details

Clever Cloud

1

M. D.

Introductions

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1 Lead Selection

Email Preview

3 Send

Live Preview



Hi Marcus,

Thanks for being part of the Clever Cloud Network — a group of people connected to our work and sharing in the opportunities we're building. As we periodically explore warm introductions, this month we're looking for relationships inside the companies below.

Know Anyone Here?

Apple

Open

Alo Yoga

Open

Jabra

Open

Microsoft

Open

Barnes and Noble Booksellers

Open

Home Depot

Open

If so, you can quickly share a bit of context about your relationship so we can explore a potential introduction.

We appreciate you being part of the Clever Cloud Network

— The Clever Cloud Team

You can update your preferences or unsubscribe anytime.

Content Editor

Click a highlighted section in the preview to edit its text.

Send a test email

demo@truelynk.com

Send test email

- Select the companies you want to ask about
- Customize the message and branding
- Send through integrated email + platform

<<

Previous

Next

View Campaign Results & Uncover New Matches

See how each campaign performs and where new relationship opportunities are emerging.



Campaigns • Campaign details

Clever Cloud

1 M. D.

Introductions

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Know Anyone Here - Fall Drive

Sent

Sent on Aug 11, 2026

Sent to Members

6

Viewed

4

67% View rate

Responded

1

17% Response rate

Introduction Paths

10

In Targets

3

Lead

Responses

Intro Paths

With Details

Relationship Strength

View by

Lead

Activision Blizzard, Inc.

1

2

0

Great 0

Good 1

Know 1

Connected 0

Name

Response

Relationship

Relationship Details

Target



Marcus Duarte

May Know Someone

Know

Add to Targets



Michael Orsoni

Know Someone

Good

Add to Targets

alo Alo Yoga

1

2

0

Great 0

Good 0

Know 1

Connected 1

Jabra

0

0

0

Great 0

Good 0

Know 0

Connected 0

ba&sh

1

1

0

Great 0

Good 1

Know 0

Connected 0

PepsiCo

0

3

0

Great 0

Good 0

Know 0

Connected 3

Hannaford

0

1

0

Great 0

Good 0

Know 0

Connected 0

Ralph Lauren Corporation

1

1

0

Great 1

Good 0

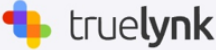
Know 0

Connected 0

- Track views, responses and Intro Paths
- See responses and relationships
- Move approved fits into Targets

Activate Introductions When Both Sides Approve

Communicate, share and review relationship details, and move to Active when both sides agree.



Target Introductions

Clever Cloud

1

M. D.

Introductions

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Approvals

Know Anyone Here

Filter by Network Member

Filter

⌵

⋮

Potential Introductions (5)

In Discussion (1)

Meet to Explore (3)

Pending Approval (1)

**ZARA USA**
Sofia Lang

Relationship: Connected

Introduction Mode: Warm Introduction

Priority:

Owner:

**Dufrain**
Marcus Duarte

Relationship: Connected

Introduction Mode: Warm Introduction

Priority:

Owner:

**Hannaford**
Marcus Duarte

Relationship: To Define

Introduction Mode: Warm Introduction

Priority:

Owner:

**ba&sh**
Sofia Lang

Relationship: Good

Introduction Mode: Warm Introduction

Priority:

Owner:

**Steph Mazuera**
Marcus Duarte

Relationship: Connected

Introduction Mode: Warm Introduction

Priority:

Owner:

**American Eagle**
Eric Aubertin

Relationship: Great

Introduction Mode: Warm Introduction

Priority:

Owner:

**Fendi**
Noah Patel

Relationship: Indirect

Introduction Mode: Warm Introduction

Priority:

Owner:

**Barclays**
Michael Orsoni

Relationship: Connected

Introduction Mode: Warm Introduction

Priority:

Owner:

**Ralph Lauren Corporation**
Eric Aubertin

Relationship: Great

Introduction Mode: Hands-On Participation

Priority: 2 - Med

Owner:

- Communicate, share insights and messages
- Review relationship details and best fits
- Both sides approve before activation

Optimize and Manage Introductions to Drive Results

Each introduction is carefully prepared with shared knowledge, insights and aligned positioning.

The screenshot displays the TrueLink CRM interface. The top navigation bar includes the TrueLink logo, the title 'Active Introductions', a 'Clever Cloud' dropdown, a chat icon, a notification bell with a '1' badge, and the user 'M. D.'. The left sidebar contains a menu with 'Introductions' (sub-item 'Active'), 'Targets', 'Leads', 'Lists', 'Company Network' (sub-items 'Network Members', 'Campaigns'), 'My Network' (sub-items 'Connections', 'Companies', 'My Lists'), 'Tools' (sub-items 'Messaging', 'Action Items', 'Email Templates'), and 'Account' (sub-items 'Company Profile', 'Users'). The main content area is titled 'Active Introductions' and features a 'Filter by Network Member' dropdown. It is organized into four columns representing different stages: 'Prepare to Reach Out (2)', 'Reaching Out (2)', 'Meeting (2)', and 'Opportunity (1)'. Each column contains cards for individual introductions, each with a company logo, name, owner, and details on Sub Stage, Relationship, Priority, and Owner. A blue callout box in the bottom left corner lists three key features: viewing active introductions by stage, aligning on positioning and next steps, and easily sharing insights, notes, and messages.

Introductions

- Active
- Targets
- Leads
- Lists

Company Network

- Network Members
- Campaigns

My Network

- Connections
- Companies
- My Lists

Tools

- Messaging
- Action Items
- Email Templates

Account

- Company Profile
- Users

Active Introductions

Filter by Network Member

Prepare to Reach Out (2)

- Tembi** (Owner: Marcus Duarte)
Sub Stage: Review Co. & Offering
Relationship: Connected
Priority: 2 - Med
- Home Depot** (Owner: Tim Black)
Sub Stage:
Relationship: Good
Priority: 2 - Med

Reaching Out (2)

- Kearney** (Owner: Eric Aubertin)
Sub Stage: Not Started
Relationship: Connected
Priority: 2 - Med
- PepsiCo** (Owner: Marcus Duarte)
Sub Stage:
Relationship: Connected
Priority: 2 - Med

Meeting (2)

- Microsoft** (Owner: Tim Black)
Sub Stage: Agreed to Meet
Relationship: Know
Priority: 2 - Med
- Old Navy** (Owner: Eric Aubertin)
Sub Stage:
Relationship: Good
Priority: 2 - Med

Opportunity (1)

- Brij** (Owner: Noah Patel)
Sub Stage:
Relationship: Connected
Priority: 2 - Med

- View Active Introductions by stage
- Align on positioning and next steps
- Easily share insights, notes and messages

Expand your Network with TrueLynk Advisors

Extend beyond your existing Relationship Network with TrueLynk Advisors, as needed.



Advisors & Introduction Partners

Active Role

Manager - Truelynk



E. A.

Inbox

Active

Targets

Advisors & Partners

Messaging

Campaigns

Management

Tasks

Email Templates

Company Profile

Users

Our Intro Partners Browse Invitations Requests & Invitations

Search advisors by name, title, company, expertise, or location...

Filters

Name	Title	Company	Expertise	Location	Join Status	Profile Visibility
JD Jennifer Dalton	Founder & CEO	Dalton Ventures	Fundraising Go-to-Market	San Francisco, CA	Not Joined	
RS Robert Stevens	Operating Partner	Summit Partners	Operations Scaling	New York, NY	Not Joined	
MP Maria Patel	Former CMO	Stripe	Marketing Growth	San Francisco, CA	Not Joined	
AW Andrew Wright	CTO Advisor	TechGrowth Advisors	Product Technology	Austin, TX	Not Joined	
LW Lisa Wang	VP Finance (Ret.)	Google	Finance Strategy	Mountain View, CA	Not Joined	
DM David Morales	Founder	ScalePath	SaaS Fundraising	Boston, MA	Not Joined	
SC Susan Clark			People Ops Culture	Seattle, WA	Not Joined	
KK Kevin Kim			Private Equity Deals	Chicago, IL	Not Joined	
NF Nina Fisher	Legal Counsel	Fisher Legal	Legal Compliance	Los Angeles, CA	Not Joined	
PJ Philip Johnson	Board Member	Various	Strategy Leadership	New York, NY	Not Joined	

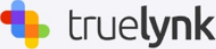
- Explore relevant TrueLynk Advisors
- Identify Advisors with the right relationships
- Recruit around your ICP and target buyers

Showing 1 to 10 of 50 advisors

< 1 2 3 4 5 >

Organized Communications & Actions

Keep collaboration moving with messages, notifications and actions in one place.



Messaging

Clever Cloud



M. D.

 Introductions

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EC Elena Chen - L.L.Bean

My Messages

Company Messages

EC Elena Chen - L.L.Bean

Aug 28

Hi Elena Chen, We see a potential fit and are interested in exploring your relati...

SL Sofia Lang - Valentino

Aug 20

Hi Sofia Lang, We see a potential fit and are interested in exploring your relatio...

EA Eric Aubertin - American Eagle

Aug 20

Have you made progress on the research?

NP Noah Patel - Apple

Aug 20

Hi Noah Patel, We see a potential fit and are interested in exploring your relatio...

SL Sofia Lang - Apple

Aug 20

At least 8 people.

SL Sofia Lang - L.L.Bean

Hi Sofia Lang, We see a potential fit and are inte

Aug 28 11:52 AM

Hi Elena Chen,
We see a potential fit and are interested in exploring your relationship(s) at L.L.Bean.
-Clever Cloud

Type a message...   

- Keep messages and intros organized
- Get notified when something needs attention
- Complete key actions directly in the workflow

Turning Warm Introductions into a Scalable Growth Channel



True Relationships. Real Results.