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LEAD-XPRESS

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Survey Says - Challenges

Companies that sell and distribute leads through :

- ✓ Channel partners, sales agents or business partners
- ✓ Or a large distributed sales team

Face common challenges:

- ✓ Have a difficult time tracking leads.
- ✓ Spend too much time manually assigning leads
- ✓ Cannot afford the cost of a lead management system for all sales channels.
- ✓ Find data and reporting are inaccurate due to the lack of a uniform system throughout the channel.

For those companies that do have a CRM:

- ✓ It’s expensive, reps don’t want to use it, training takes a long time
- ✓ It’s difficult to move and track leads through the sales cycle – from marketing to inside sides, to outside sales and channel partners

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The Solution

Lead-Xpress...

1. Drastically reduces time assigning and tracking leads.

2. Simplifies the lead update process.

3. Offers the *lowest* prices in the industry.

4. Affordable pricing allows everyone involved in the channel access to the system.

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Benefit #1 – Saves Time

Lead-Xpress drastically reduces time spent on lead distribution and tracking.

- Managers can assign leads and request for lead updates directly from the system with 2-3 clicks.
- Lead recipients receive leads directly via email, eliminating manual lead tracking.

Benefit #2 – Simplify Updating CRM

Lead-Xpress simplifies the account and sales lead update process for sales reps

- Reminders to update leads are sent via email.
- The lead update form takes seconds to complete.
- The simple update form requires no training whatsoever.
- Reps can be alerted of newly assigned leads immediately via text message

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Benefit #3 - Affordable

Lead-Xpress offers industry-first rock-bottom prices.

- Users can choose the most affordable pricing model for their needs.
  - User-Based: Monthly subscription of $10 or less per Xpress user
  - Lead-Based: $2 or less per outgoing lead
- Compared with full-fledged CRMs that charge $65 per user per month, businesses can easily save 90% per Xpress user!

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Benefit #4 – Better Information

Implementing Lead-Xpress results in more accurate information in the system

- The affordable pricing methods allow everyone involved in the sales channel to use a single uniform system receive and update leads.
- The system is updated more regularly, resulting in more accurate data.
- The precise data is used for accurate forecasts and better business decisions.

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Simple Lead Management Form

From: Your Sales Manager
To: Hugo.Sailz@YourCompany.com
Subject: New Lead / Lead Follow-up Request

You have a new lead or a request to update an existing opportunity.
Please update the status in the email below or click click here to see the record in your web browser.

Contact Info

Name	Mr. John Smith	**Region**	Central Region
Title	President	**Account Manager**	Hugo Sailz
Company	Sound Decisions	**Partner**	Midwest Distributors
Address 1	123 Any Street	**Partner Rep**	June Bug
City	Your Town	**Campaign**	Pay-per-Click
State	NY	**Phone 1**	800-699-4164
Zip	20202	**Web Address**	www.Sound-Decisions.com

Click Actions

- ☐ Did Not Reach
- ☐ CB - Tomorrow
- ☑ Investigating Solutions
- ☐ Add to Lead Nurturing
- ☐ Waiting for Budget
- ☐ Call Back - 1 Week
- ☑ Demo Completed
- ☐ Send Intro eMail
- ☑ Budget Approved
- ☑ Appointment Scheduled
- ☐ Project Approved
- ☐ Send Product Info
- ☑ Phone Conversation

Lead Status Summary

Lead Status Prospects
Lead Value $25,000 USD
Sales Stage PROPOSAL SUBMITTED (50%)
Forecast Date June 2011
Probability 50%
Initial Status 6-10 Seats
Lead Source Yahoo

Custom Form

Potential Number of Agents
--- Please Select ---
Installed Vendor:
Call Back Date

TYPE OF CUSTOMER:
◉ CALL CENTER ○ RESELLER ○ END USER
Preferred Vendor
--- Please Select ---

Sales Rep Comments/Notes

Submit

Customizable Email & Contact Info

From: Your Sales Manager
To: Hugo.Sailz@YourCompany.com
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State	NY	**Phone 1**	800-699-4164
Zip	20202	**Web Address**	www.Sound-Decisions.com

- Customize the content of the email.
- Includes a link to the record for updates over time.
- The contact info also provides the name of the other people working the account (partner, partner rep).

Click Action Access

- Click Actions provide the user with the ability to automate tasks.

- Multiple tasks can be accomplished with a single click of the mouse.
  - Send an email
  - Add to Lead Nurturing
  - Schedule a callback
  - Assign the record
  - Add a note
  - Send a text message
  - Can be used to update sales progress – Lead Status, Sales Status etc.
  - And more…

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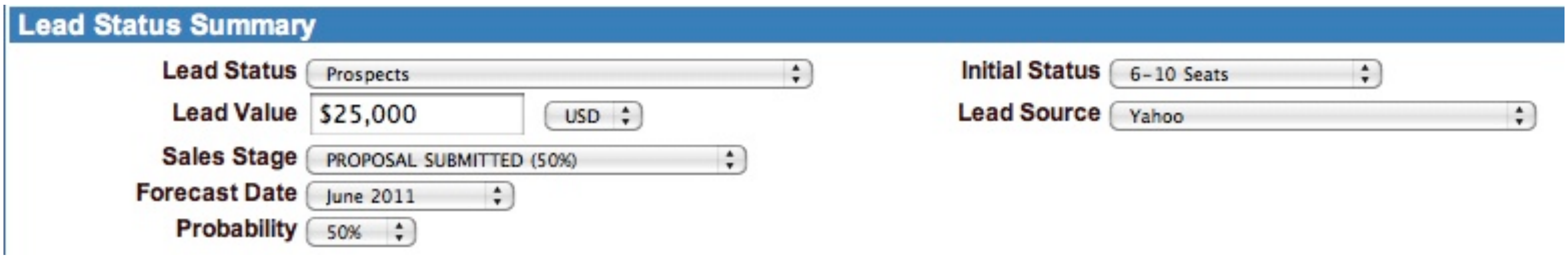
Easy Update Lead Status



- Easy-to-use drop down menus eliminate the need for training.
- Fast & easy-to-use means more reps will update their accounts.
- Track Accounts & Leads
  - •Lead Status
  - •Lead Value
  - •Sales Stage
  - •Forecast Date
  - •Probability
  - •And More… these drop downs are customizable

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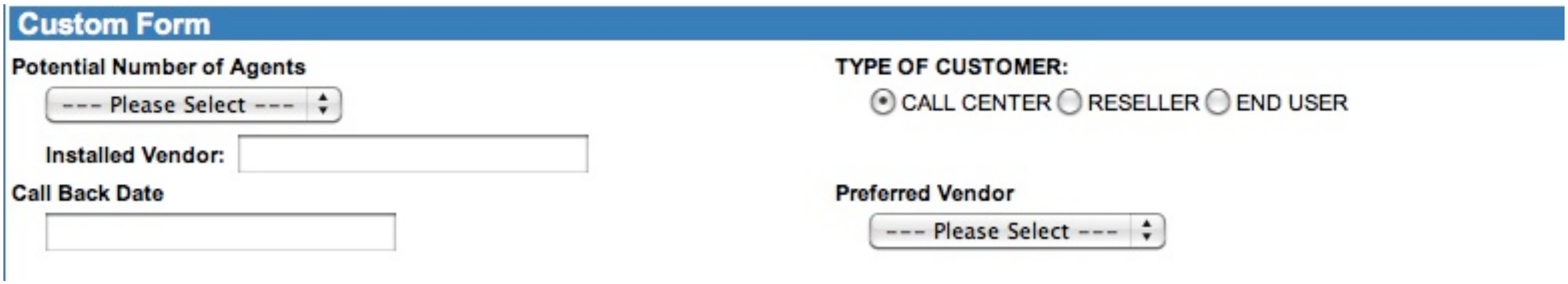
Add Customer Specific Fields



- Add Customer Specific Form with Customer Defined Fields
- Customer Form is Flexible Enough for Any Industry
- Custom Fields Include
  - Fill in the blank
  - Text Areas
  - Drop Down Menus
  - Radio Buttons
  - Check Boxes
  - Single/Multi Select
  - And More…

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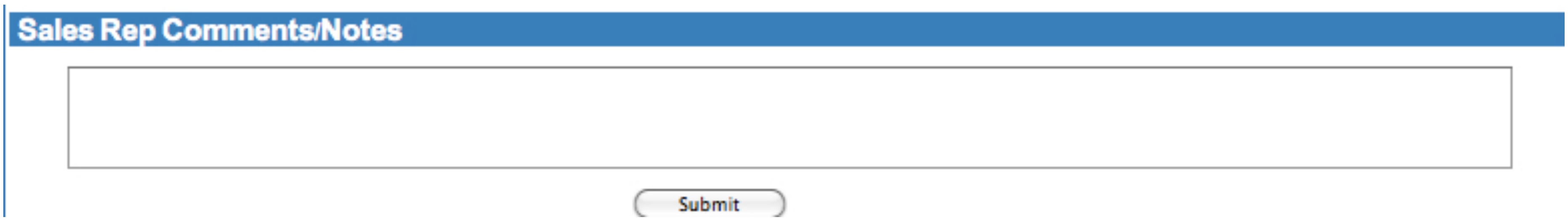
Store Rep Comments & Notes



•Creates an historical record of interaction with the account

•The history is included with the email

•Perfect when more than one person is working an account – e.g.

- •Inside Sales
- •Field Sales
- •Sales Engineer
- •Specialist
- •Partner Rep etc.

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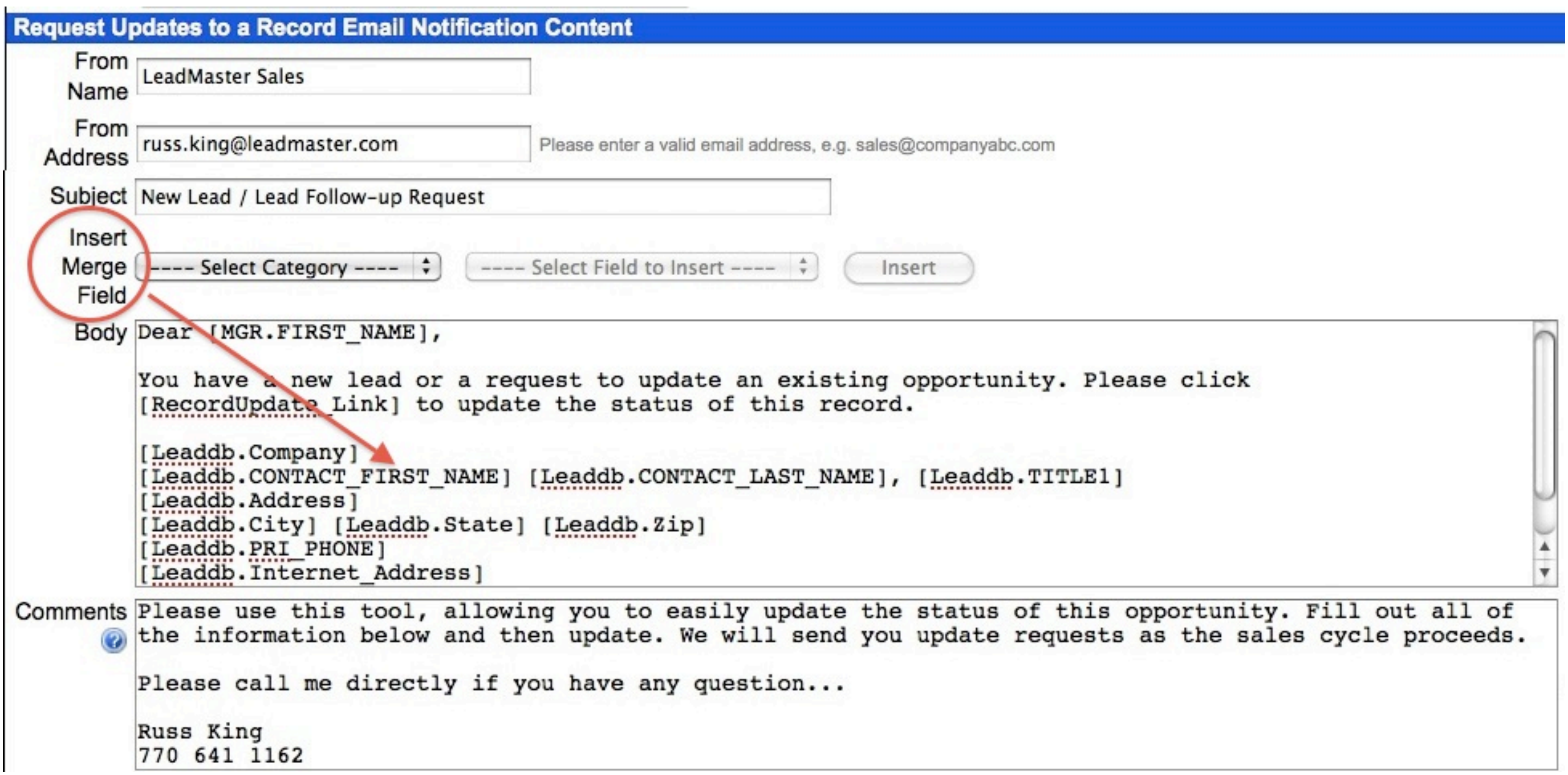
Easy Configuration

Include the prospect contact information with pull-down menus.


Request Updates to a Record Email Notification Content

From Name: LeadMaster Sales

From Address: russ.king@leadmaster.com — Please enter a valid email address, e.g. sales@companyabc.com

Subject: New Lead / Lead Follow-up Request

Insert Merge Field: ---- Select Category ---- | ---- Select Field to Insert ---- | Insert

Body:

```
Dear [MGR.FIRST_NAME],

You have a new lead or a request to update an existing opportunity. Please click
[RecordUpdate_Link] to update the status of this record.

[Leaddb.Company]
[Leaddb.CONTACT_FIRST_NAME] [Leaddb.CONTACT_LAST_NAME], [Leaddb.TITLE1]
[Leaddb.Address]
[Leaddb.City] [Leaddb.State] [Leaddb.Zip]
[Leaddb.PRI_PHONE]
[Leaddb.Internet_Address]
```

Comments:

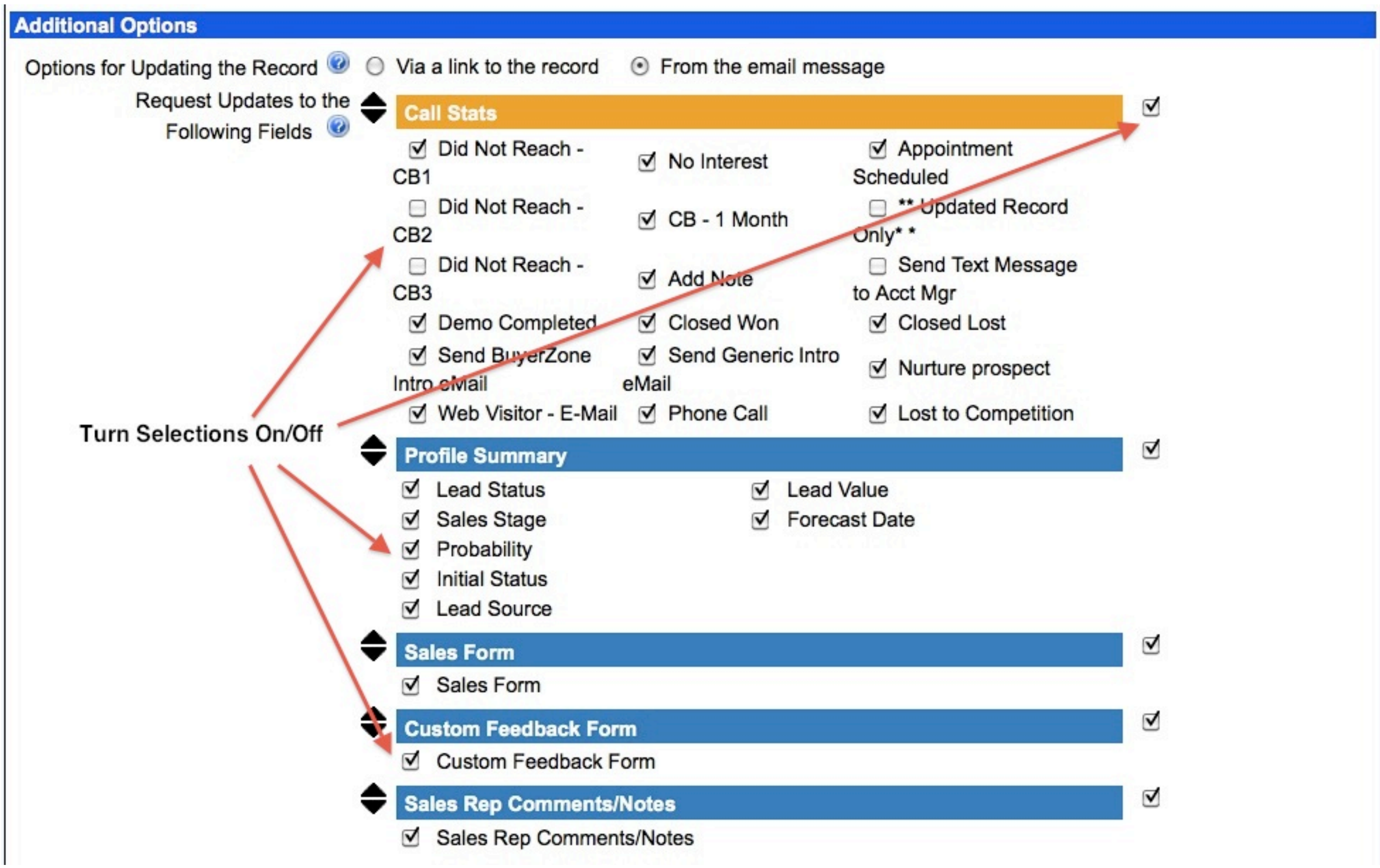
```
Please use this tool, allowing you to easily update the status of this opportunity. Fill out all of
the information below and then update. We will send you update requests as the sales cycle proceeds.

Please call me directly if you have any question...

Russ King
770 641 1162
```

Easy Configuration

Add Customer Forms & Add/Subtract Fields with a Mouse Click



Lead Distribution

Lead-Xpress distributes leads via email with a link to the CRM.

- Lead progress is easily tracked.
  - Managers save vast amounts of time manually assigning and tracking leads.
- Updates to leads can be requested at any time.
  - Easy update for reps result in more leads being updated.
  - Database is more accurate and current, creating more accurate forecasts and better business decisions.
- Leads can be sent immediately via text message.
  - Reps can respond to a new lead's inquiry within seconds
  - Shorter response times result in greater close ratios.

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Benefits Summary

- Save vast amounts of money.
- Save managers' precious time.
- Eliminate the need for Sales Rep training on the CRM
- More accurate data, resulting in more accurate reports and forecasts and better business decisions.
- Save sales reps' time with easy lead-update forms.
- Immediate text message alerts about new leads result in faster response times and greater close ratios.
- Affordable pricing means channel partners and sales agents can access the CRM, receiving leads and updating accounts.

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Pricing Options

Offering industry-first rock-bottom prices.

- Users can choose the most affordable pricing model for their needs.
  - User-Based: Monthly subscription of $10 or less per Xpress user
  - Lead-Based: $2 or less per outgoing lead
- By comparison, most cloud-computing CRMs that charge $65 per user per month, businesses can easily save 90% per Lead-Xpress user!

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What's Holding You Back?

- Risk-Free
  – You have nothing to lose
- No Long Term Contracts
  – As with LeadMaster, Lead-Xpress lets you choose whether or not to extend your subscription monthly.
- Hosted application
  – Flexibility of upgrading or reducing Xpress users at any time.

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