



hosted **B2B** marketing solutions

# LeadManager™- *Internet Marketing Lead Management Solution*

May, 2009



## LeadManager™ Overview

- **Easy-to-use solution that allows sales and marketing departments to collect, store, and manage sales leads.**
- **Integrates with internet marketing efforts right out-of-the box with no costly custom integrations**
- **Includes many of the features found in industry leading online CRM software, but with a much simpler interface and a significantly lower cost**

## LeadManager™ Core Functionality

- **Enables easy and intuitive reporting and custom searches**
- **Provides real-time browsing and activity history for each lead**
- **Allows complex marketing segmentation within minutes**
- **Exports targeted mailing lists in support of e-mail marketing**

## Key Differentiators

- **Out-of-the-box web site integration**
  - Tracks the browsing history of your leads on your web site(s) from before they filled out your form and any time thereafter
  - Tracks files download activity
  - Monitors and measures effectiveness of each lead-generating campaign
  - Enables built-in prevention of duplicate lead entries, filtering of unwanted domains, and blocking of accidental form re-submissions to ensure accurate lead counts and activity reporting
  - Reports keyword search terms and referring domains for lead activity originating from organic search or 3<sup>rd</sup> party inbound links
- **Base subscription includes up to 10 user accounts**
- **Easy setup and simple-to-use interface**
  - Minimal training required for staff
  - Effortless reporting

# Setup: Customize Your Data

Easy setup pages allow you to quickly manage custom data, lead statuses, filters, and assignment rules.

### Lead Status List

LEAD STATUS NAME	
<input type="text"/>	<input type="button" value="ADD"/>
Competitor	x
Cold	x
Prospect	x
Client	x

### Domain Filter List

DOMAIN NAME	
<input type="text"/>	<input type="button" value="ADD"/>
my-domain.com	x
competitor-domain.com	x
test.com	x

### Custom Data

	CUSTOM FIELD VALUE	CUSTOM FIELD TYPE
CUSTOM FIELD 1	<input type="text" value="E-Newsletter Opt-In"/>	<input type="checkbox"/>
CUSTOM FIELD 2	<input type="text" value="Market Segment"/>	<input type="text"/>
CUSTOM FIELD 3	<input type="text" value="Procurement Budget"/>	<input type="text"/>
CUSTOM FIELD 4	<input type="text" value="Region ID"/>	<input type="text"/>
CUSTOM FIELD 5	<input type="text" value="E-Mail Opt-Out"/>	<input type="checkbox"/>
CUSTOM FIELD 6	<input type="text" value="Department"/>	<input type="text"/>
CUSTOM FIELD 7	<input type="text" value="Demo Request"/>	<input type="checkbox"/>
CUSTOM FIELD 8	<input type="text" value="Phone Call Request"/>	<input type="checkbox"/>

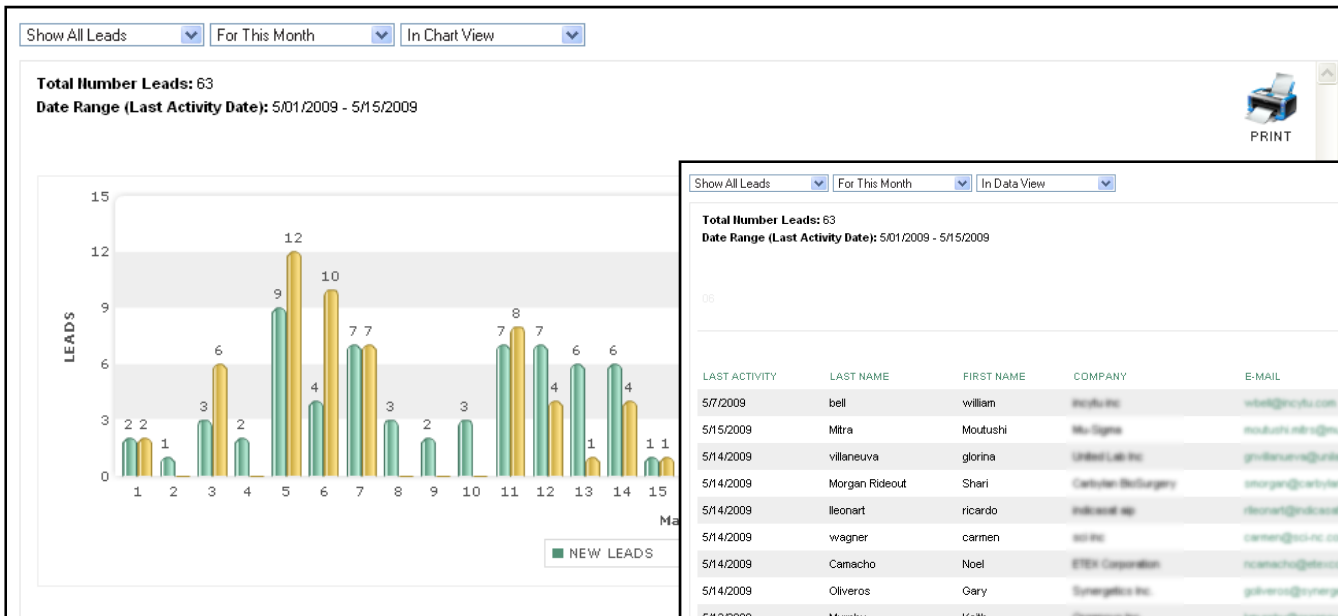
### Filter By

	FIELD	OPERATOR	VALUE	THEN ASSIGN TO	USER
1	IF <input type="text" value="E-mail"/>	<input type="text" value="Contains"/>	<input type="text" value="acme-corp.com"/>	THEN ASSIGN TO	<input type="text" value="Michael Sheldon"/>
2	IF <input type="text" value="State/Prov."/>	<input type="text" value="Equals"/>	<input type="text" value="TX"/>	THEN ASSIGN TO	<input type="text" value="Chris Martin"/>
3	IF <input type="text" value="Country"/>	<input type="text" value="Not Equals to"/>	<input type="text" value="USA"/>	THEN ASSIGN TO	<input type="text" value="Chris Sullivan"/>
4	IF <input type="text" value="Activity Title"/>	<input type="text" value="Equals"/>	<input type="text" value="White Paper Download"/>	THEN ASSIGN TO	<input type="text" value="Michael Sheldon"/>

# Dashboard: Reporting At A Glance

Quickly view your data in easy-to-interpret formats by:

- New Leads versus Return Activity
- Hour, Day, Week, Month, Quarter, & Year
- Chart or Data View



**Total Number Leads: 63**  
**Date Range (Last Activity Date): 5/01/2009 - 5/15/2009**

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LAST ACTIVITY	LAST NAME	FIRST NAME	COMPANY	E-MAIL	STATUS	DETAIL
5/7/2009	bell	william	bellco	wbell@bellco.com	New Lead	<a href="#">Detail</a>
5/15/2009	Mitra	Moutushi	Mu Signs	moutushi.m@mu-signs.com	New Lead	<a href="#">Detail</a>
5/14/2009	villaneuva	glorina	United Labs Inc	gvillaneuva@united.com.ph	New Lead	<a href="#">Detail</a>
5/14/2009	Morgan Rideout	Shari	Catalan McLaughery	smorgan@catalan.com	New Lead	<a href="#">Detail</a>
5/14/2009	Ileonart	ricardo	Indicool sp	rlleonart@indicool.org.es	New Lead	<a href="#">Detail</a>
5/14/2009	wagner	carmen	soi inc	carmen@soi-inc.com	New Lead	<a href="#">Detail</a>
5/14/2009	Cernacho	Noel	ETEK Corporation	ncernacho@etekcorp.com	New Lead	<a href="#">Detail</a>
5/14/2009	Oliveros	Gary	Sunergatics Inc	goliveros@sunergatics.com	New Lead	<a href="#">Detail</a>
5/13/2009	Murphy	Keith	Organics Inc	kmurphy@organics.com	New Lead	<a href="#">Detail</a>
5/13/2009	Jankovic	Danko	Pharmstandard LLC	djankovic@pharmstd.ru	New Lead	<a href="#">Detail</a>

EXPORT PRINT

# Leads: Customize Your Search

Quickly build custom lead segmentation based on:

- Geography
- Campaign Activity
- Registration Type
- Lead Source
- Custom Data
- Downloaded Files

**View**

NAME:

VIEWABLE TO:  All Users  Only Me

**Filter By**

	FIELD	OPERATOR	VALUE
1.	State/Prov. <input type="button" value="v"/>	Equals <input type="button" value="v"/>	<input type="text" value="TX"/>
2.	State/Prov. <input type="button" value="v"/>	Equals <input type="button" value="v"/>	<input type="text" value="NM"/>
3.	State/Prov. <input type="button" value="v"/>	Equals <input type="button" value="v"/>	<input type="text" value="AZ"/>
4.	<input type="button" value="v"/>	Equals <input type="button" value="v"/>	<input type="text" value="CA"/>
5.	<input type="button" value="v"/>	Equals <input type="button" value="v"/>	<input type="text" value="NV"/>
6.	<input type="button" value="v"/>	Equals <input type="button" value="v"/>	<input type="text" value="CO"/>
7.	<input type="button" value="v"/>	Equals <input type="button" value="v"/>	<input type="text" value="UT"/>

**View**

NAME:

VIEWABLE TO:  All Users  Only Me

**Filter By**

	FIELD	OPERATOR	VALUE
1.	Campaign <input type="button" value="v"/>	Contains <input type="button" value="v"/>	<input type="text" value="AW"/>

**View**

NAME:

VIEWABLE TO:  All Users  Only Me

**Filter By**

	FIELD	OPERATOR	VALUE
1.	Activity Title <input type="button" value="v"/>	Contains <input type="button" value="v"/>	<input type="text" value="Seminar"/>

# Leads: Automated Campaign Tracking

## Track the real-time success of online marketing campaigns

- LeadManager enabled landing pages capture Campaign IDs encoded in the URLs
- LeadManager automatically detects the new Campaign, adding it to an easy-to-use Campaign report dropdown for instant real-time reports

**Activity History**

CAMPAIGN TITLE	TYPE	TITLE	DATE
HP0905	Contact Form	Energy Management And The Real-Time Enterprise	5/11/2009 9:15:47 AM

**CAMPAIGNS**

All Campaigns

All Campaigns

HP0905

LAST ACTIVITY	LAST NAME	FIRST NAME	CAMPAIGN ID	E-MAIL	STATUS	DETAIL
5/7/2009	bell	william	TW0904	wbell@ncfu.com	New Lead	Detail
5/15/2009	Mitra	Moutushi	CM090501	moutushi.mitra@nu-sigma.com	New Lead	Detail
5/14/2009	villaneuva	glorina	CM090501	gvillaneuva@unlab.com.ph	New Lead	Detail
5/14/2009	Morgan Rideout	Shari	CM090501	smorgan@carlyan.com	New Lead	Detail
5/14/2009	leonart	ricardo	TW0904	rleonart@relocast.org.pe	New Lead	Detail
5/14/2009	wagner	carmen	CM090501	cawagner@cc-nc.com	New Lead	Detail
5/14/2009	Camacho	Noel	CM090501	ncamacho@telecorp.com	New Lead	Detail
5/14/2009	Oliveros	Oary	MS0904	goliveros@synergylabs.com	New Lead	Detail
5/13/2009	Murphy	Keith	CSS0905	kmurphy@organovo.com	New Lead	Detail
5/13/2009	Jankovic	Darko	CSS0905	djankovic@shemoll.ru	New Lead	Detail

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# Lead Details: Comprehensive Histories

## Activity History tracks key actions like:

- Form Submissions (Contact Forms, Event Registrations, Quote Requests, Newsletter Signups, Materials Requests, etc.)
- File Downloads (PDFs, PowerPoint Slides, Software Demos, etc.)

## Browsing History tracks:

- Any HTML-based page on your web site that your lead has visited before and after becoming a lead – including the date and time the page was viewed
- A running tally of unique visits to your web site
- The referring domain from which they arrived at your site if from a 3<sup>rd</sup> party inbound link
- The search terms used if coming from search engine results
- The browser type they used to view your web site

Activity History			
CAMPAIGN TITLE	TYPE	TITLE	DATE
HP0905	Contact Form	Energy Management And The Real-Time Enterprise	5/11/2009 9:15:47 AM

Download Browser History		
	PAGE URL	DATE
Five Key B2B Marketing Trends In 2009	http://www.t2inc.com/white-papers/thank-you.asp	5/15/2009 9:27:54 PM
Five Key B2B Marketing Trends In 2009	http://www.t2inc.com/white-papers/b2b-trends-2009-download.asp	5/15/2009 9:27:18 PM
ROI Marketing: The New Opportunity for Growing Companies	http://www.t2inc.com/white-papers/roi-download.asp	5/15/2009 1:57:00 PM
Five Key B2B Marketing Trends In 2009	http://www.t2inc.com/white-papers/b2b-trends-2009-download.asp	5/15/2009 1:55:32 PM

# Logs: User Accountability

## Monitor productivity with user logs:

- View all leads viewed or updated by particular users
- View all users who have viewed or updated a particular lead

View Log		
ACTION	USER	DATE / TIME
viewed	Martin, Chris	5/15/2009 5:56:51 AM
viewed	Martin, Chris	5/15/2009 5:57:28 AM
viewed	Martin, Chris	5/15/2009 5:58:18 AM
viewed	Martin, Chris	5/15/2009 5:58:47 AM
viewed	Sheldon, Michael	5/15/2009 11:57:25 AM
viewed	Sheldon, Michael	5/15/2009 11:59:56 AM

View Log		
LEAD NAME	ACTION	DATE / TIME
		5/4/2009 11:13:31 AM
		5/4/2009 11:14:43 AM
		5/4/2009 11:14:47 AM
		5/4/2009 11:15:13 AM
		5/4/2009 11:17:45 AM
		5/4/2009 11:49:07 AM
		5/4/2009 12:05:01 PM
		5/4/2009 12:06:50 PM
		5/4/2009 12:09:42 PM
		5/4/2009 12:09:49 PM
Martin, Chris	viewed	5/4/2009 12:11:29 PM
Martin, Chris	viewed	5/4/2009 12:33:02 PM
Martin, Chris	viewed	5/4/2009 12:33:41 PM
Martin, Chris	viewed	5/4/2009 12:37:39 PM
Martin, Chris	viewed	5/4/2009 12:53:42 PM
Martin, Chris	viewed	5/4/2009 12:59:41 PM
Martin, Chris	viewed	5/4/2009 1:02:47 PM
Martin, Chris	viewed	5/4/2009 1:02:55 PM
Martin, Chris	viewed	5/4/2009 1:05:40 PM
Martin, Chris	viewed	5/4/2009 1:06:15 PM

## **Secure: Encrypted, Protected, & Backed Up**

- **Sessions are fully encrypted HTTPS connections**
- **Data is maintained within a secure and reliable infrastructure that offers enterprise-class levels of performance, speed, and network availability**
- **Data is backed up nightly and retained for 2 weeks**

## Responsive Product Support

- **All help requests are responded to promptly by our live, on-staff, technical support team within 24 hours — usually within hours**
- **New features and system enhancements are rolled out on a quarterly basis**
- **User feedback is constantly being evaluated to optimize the user experience**
- **Every user suggestion is evaluated by the software architecture team**

## Cost Structure

# USERS	SETUP	MONTHLY	ADDITIONAL USERS
10	\$500	\$200	\$10/user
20	\$525	\$270	\$7/user
50	\$650	\$420	\$5/user
100	\$775	\$570	\$3/user
Call for larger blocks			

## Try It Without Risk

**We'll hold all fees for 60 days and provide you with:**

- **2 user accounts with full permissions**
- **Form code and setup assistance for up to two landing pages which include:**
  - Campaign tracking
  - Up to 4 custom data fields
  - Custom form field validation
  - Auto-response e-mail template setup
  - Auto-notification e-mail template setup
- **Browser History tracking**

**If after 60 days you're not interested in using LeadManager, you can cancel at no cost.**