

ApexTwo LMS

The ApexTwo Customized Lead Management Solution



*Online Marketing and Lead Generation
Experts*

www.apextwo.com

The ApexTwo Lead Management Solution

The ApexTwo Lead Management Solution (LMS) is a comprehensive, marketing automation solution for increasing the quantity and improving the quality of inbound, sales-ready leads. The ApexTwo LMS drives revenue, improves sales efficiency, increases accountability, and reduces cost by integrating your website with your Sales or Customer Relationship Management (CRM) system and outbound marketing activities including email marketing. This seamless integration provides you with detailed visitor metrics, reporting, and visibility down to each individual visitor – all within your CRM system.

Benefits

- More leads
- Better qualified leads
- Better coordination between Sales and Marketing
- Full ROI reporting on marketing spend
- Total relationship management
- No more cold-calling
- Lower cost of sales
- Higher return on marketing investment

Challenges Addressed

All companies currently generating online leads face a common set of challenges in driving traffic, converting leads, and nurturing them into customers. In addition, many B2B companies face these unique challenges:

- Which Pay-Per-Click (PPC) advertisements and landing pages are producing *quality* leads that generate closed business?
- What parts of the website are producing those quality leads?
- How do time of day and day of week affect the quality of leads?
- How do you tie phone-in leads back to the original search information and online activity that brought them in? Often, especially for big-ticket products or services, the best leads start on the web, then convert via a phone call.

Sales-driven organizations that do a significant amount of prospecting are also challenged with:

- How do you improve the productivity of the sales team?
- How can you reduce staff turnover and prospecting burn-out?
- Why can't we just get better leads?

Because No Two Businesses Are Alike

ApexTwo LMS is more than just a standalone, one-size-fits-all *product* running as a separate application with redundant data and all of the challenges of synchronization. It's a *solution*, customized to your specific environment, beginning with a common core platform and pre-engineered connectors integrated into your existing website, email marketing, and CRM environments. Instead of managing your marketing activities from a separate product requiring you to learn a new interface, you can work directly within the CRM system you already know.

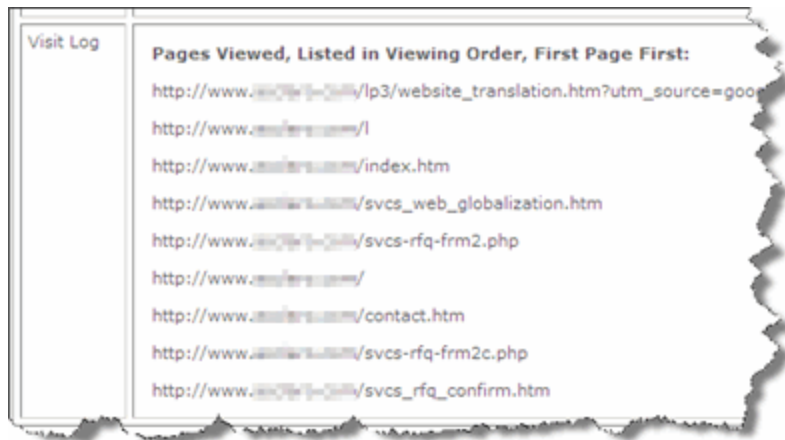
Features

ApexTwo LMS addresses these needs with a lead management engine that is seamlessly integrated into your existing website and CRM system. The solution contains a number of industry-leading features for the SMB market:

- **CRM Lead Record creation** that captures visible and hidden fields from webforms.
- **Support for Multi-Part Forms** – Depending on your situation, you may find it desirable to capture lead information in a series of forms that gradually ask for more qualifying information, such as an RFQ form.
- **Lead Creation for Abandoned Forms** – In the event that your visitor quits the form submission process prematurely after the first page, a lead record will still be created in the CRM system.
- **Form Creation Tool** – A tool for generating Javascript / HTML web forms with the ability to specify campaign information and hidden fields to be captured in CRM records.
- **Warm Lead Generation** – ApexTwo's unique approach synchronizes your email marketing campaigns to your website and CRM. Not only do you get open rates, but visitor-specific tracking, lead scoring and special triggers

that schedule a sales call based on visitor activity. You'll never cold-call again.

- **Advanced Visitor Tracking and Lead Sourcing** - Information for each individual visitor is captured in the visitor's CRM Lead / Contact record, including PPC campaign information, keyword searched, initial landing page, individual pages visited, and more.
- **Visitor / Lead Tracking** – All visitors are assigned a unique identifier that allows popular areas of the site to be tracked. When a visitor later chooses to identify himself by completing a registration form or requesting a call back, a lead record is created, which includes all of the prospect's previous visit history.

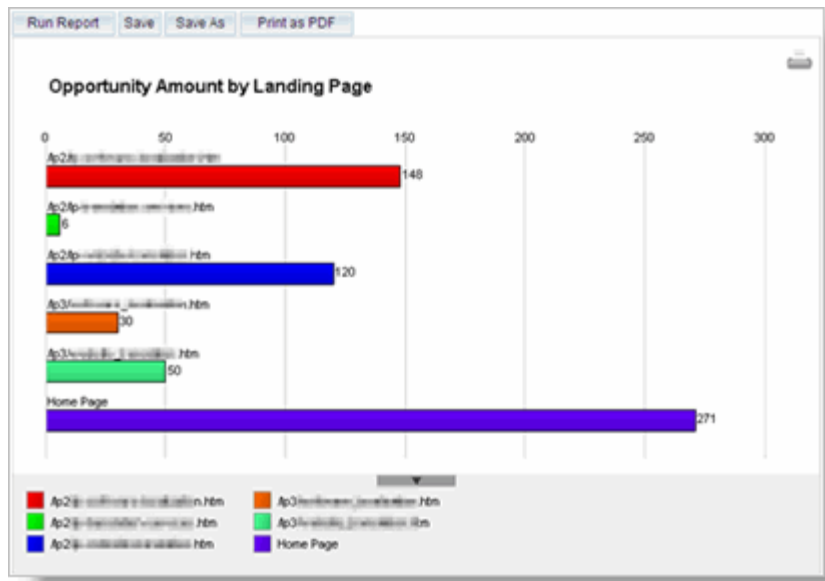


- **No Lead Duplication** – Many of today's CRM systems, including Salesforce.com, SugarCRM, and NetSuite, create duplicate lead records in the system when a visitor takes more than one action over time. For instance, if a visitor fills out a form and then downloads a whitepaper, the lead is counted twice. This causes the visitor to receive multiple contacts during your marketing activities, which can be annoying and cause you to lose a sale. Our SugarCRM plug-in identifies the visitor's

Name	Account Name	Date Created	Lead Source	Conversion Method	Lead Status
E-Field Corp		2008-09-15 11:12	PPC	RFQ	In Process
Contra Trade I		2008-09-15 09:19	Event		New
		2008-09-15 02:13	Web	RFQ	In Process
WebCorp		2008-09-13 15:00	PPC		Assigned
		2008-09-12 18:24			New
WebCorp		2008-09-12 04:45	PPC	Request Call Back	Assigned
Evans & Sons, LLC		2008-09-11 13:42	PPC	RFQ	In Process
City Name LLC		2008-09-10 21:32	Web		In Process
Market Solutions		2008-09-10 10:23	PPC		Assigned
Evans & Sons		2008-09-10 10:14	PPC		Assigned

email address and updates the *existing* record with subsequent activities, eliminating the need to manually de-dupe your leads. In addition to providing a cleaner database and better customer service, this solution allows you to track one true history for each lead over time.

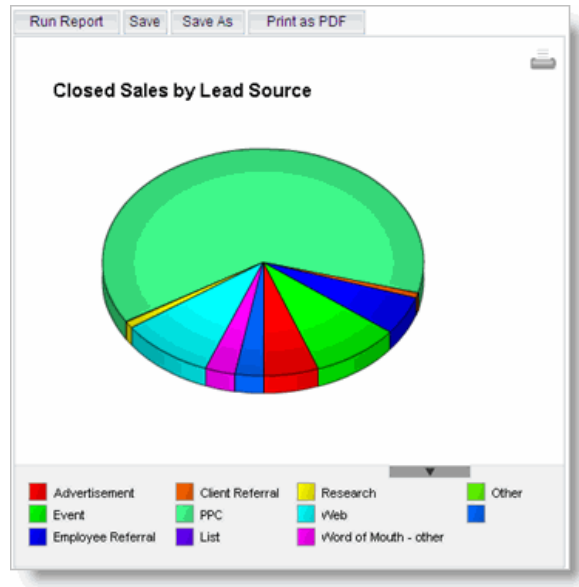
- **SEM ROI Dashboard** – One of today’s marketing challenges is that most CRM systems do not adequately address the need to manage online marketing activities beyond email campaigns. With ApexTwo LMS, all of your PPC campaign information, search terms, visitor’s IP/location, landing page, and more are included in the lead record when it’s created. This allows you to pull reports that key on ad campaigns, landing page testing, GEO positioning, and more.



- **Lead Scoring** – Based on predefined parameters and the initial information a visitor provides on online webforms, leads are automatically scored based on various parameters. These scores are provided for use in prioritizing where you spend your time and effort.

LEAD SCORE ---- ACCOUNT POTENTIAL	
Lead Score: 39	Industry: ■
Potential Projects: ■ Website	Company Revenue: Under \$10 M
Potential Langs: 3-5 Langs	No. of Employees:
Ann. Loc Potential: Under \$10 K	

- **ROI Reporting with Online LeadGen / Offline Sales** – With all of this information within one single CRM system, you can tie offline sales back to leads that were generated online, giving you a total ROI view of your marketing activities.



- **Analytics for Call-in Leads** – ApexTwo LMS addresses the difficulty of tying leads back to their original search activity when visitors begin with a web search and visit to the website but convert with an inbound phone call. You could use a designated toll-free phone number to track where the lead came from, but that’s usually as far as tracking can go. By using specially encoded emails, ApexTwo LMS brings the caller back to the website so that their contact information given over the phone can now be tied back to their original visit history and campaign information – giving you full accounting of sales-to-marketing ROI.
- **CRM Alerts** - For existing leads that return and/or take specific actions at the website, ApexTwo LMS will create a history record in the CRM system that can then have an alert action tied to it.
- **Company and Location Information** – Geographical region, company domain, and ISP information are recorded for all visitors to your website.
- **Web “Lead Pushing”** – ApexTwo LMS makes it possible to “push” un-converted visitors from larger, more prominent companies over to the CRM system creating lead records for subsequent warm calling.

Benefits Realized

ApexTwo LMS provides many benefits, including:

- **Automated Lead Creation and Notification** – You no longer need to re-key opportunity information from online RFQ lead forms, better informing your reps before making a first phone call to your prospects.
- **Fewer Lead Record Errors** – Since lead data is automatically captured directly to CRM records, you'll experience fewer data errors and reduced need for manual data reentry.
- **Increased Sales Rep Efficiency** - Because lead records are already in the system, reps no longer need to spend time re-entering them into your CRM.
- **Faster Lead Follow-up** - All of these benefits add up to being more responsive to your prospective customers.
- **More Consistent Lead Quality Ratings** – Because lead scoring is computed automatically according to a combination of fields that can be entered either by the rep or the prospect, leads are more consistently scored across different personnel and situations.
- **Better Leads / Increased Sales** - By focusing efforts on leads with higher lead scores, reps will spend their time more productively working leads with the most promise.
- **Full Marketing ROI Reporting** – With complete lead capture information for both online and offline (phone-in) conversions, you're able to accurately tie all sales directly back to the original lead source, campaign, or landing page that produced them.
- **Higher ROI PPC Campaigns** – With the ability to tie projected opportunities back to PPC campaigns, ad groups, and specific landing pages, you can more easily "fine-tune" these items to improve not only conversion rate but lead quality as well.
- **Ability to Set Up Nurturing "Tracks"** – As a follow-up step using the workflow automation found in many CRM packages, you can create nurturing tracks and drip marketing campaigns focused on the specific interests of individual leads, based on the interests they've identified, either directly or indirectly.

The Custom Advantage

ApexTwo provides demand generation and lead management solutions that are customized to the strategic needs of your specific business. For less total cost of ownership than a proprietary, cookie cutter SaaS solution, you have a custom solution that *you* own. Our lead management engine is licensed to you on a commercial, open source license. You pay one licensing fee which gives you a perpetual license to use and extend the solution – either yourself or using our services.

Benefits

- Competitive sales advantage – Because this solution is tailored to your business process and readily extendable, you now have the opportunity to create true strategic advantage over your competitors.
- No monthly fees – You pay a one-time licensing and implementation fee.
- You own it - Commercial open-source license means it is yours to keep and extend.
- Lower total cost of ownership – No escalating monthly fees or teaser subscriptions that misrepresent your total cost of ownership.
- Conforms to the way you do business, not the other way around.

About ApexTwo

ApexTwo is focused on the front end of business, providing high-value consulting services that range from the creation of traditional and Blue Ocean marketing strategies right through to the implementation of cost-effective solutions and programs for online and offline lead generation, marketing automation, and CRM integration.

ApexTwo Inc.

**1020 Milwaukee Ave, Suite 300A
Deerfield, IL 60015
www.apextwo.com
847.230.9870**
