

PRODUCTS & FEATURES LIST

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ProspectVision™ & Lead Management Automation (LMA)™

Feature	ProspectVision™	Lead Management Automation (LMA)™
Automatic Web Form Tracking <i>Identify what interested a lead before the form submission.</i>	✓	✓
Org Types <i>Categorize companies into different color-coded "buckets" for filtering and analysis.</i>	✓	✓
Daily Lead Report <i>Receive a lead report of businesses and people, along with their referrer, that visit your website.</i>	✓	✓
Company Identification (Visitor Tracking) <i>Identify businesses that visit your website using proprietary process that's unmatched in the industry.</i>	✓	✓
People Identification (Visitor Tracking) <i>Identify people that visit your website.</i>	✓	✓
Dashboard <i>Customizable dashboard to see sales and marketing performance at a glance.</i>	✓	✓

Feature	ProspectVision™	Lead Management Automation (LMA)™
Real-Time Traffic Analysis <i>See website visitors in true real-time.</i>	✓	✓
On-Site Search Tracking <i>Append onsite keyword search to website visitor profiles.</i>	✓	✓
Custom Tracking Parameters <i>Append custom data to prospect profiles from URL data.</i>	✓	✓
Automatic Original Lead Source Tracking <i>Track the origin of a lead through their lifecycle.</i>	✓	✓
Support Portal <i>Access 100s of support videos, documentation, and a ticketing system.</i>	✓	✓
Contact Manager <i>Keep contacts organized and prevent duplicates.</i>	✓	✓
CRM Push (Insightly, Base CRM, Zoho CRM, Salesforce.com, Pipedrive and more!) <i>Easily push prospects into your favorite CRM with the click of a button.</i>	✓	✓

Feature	ProspectVision™	Lead Management Automation (LMA)™
Wistia Integration <i>Capture new leads in Lead Liaison and append integration with video to a Prospect's profile.</i>	✓	✓
Email Integration (MailChimp, Constant Contact, and more!) <i>Connect email engagement to brand engagement and deliver valuable sales insight.</i>	✓	✓
Basic Lead Scoring <i>Use out-of-the-box scoring rules to help qualify and prioritize leads.</i>	✓	✓
Private Label <i>Change colors, logos, and more across the application to match your company's look and feel.</i>	✓	✓
Trackable Content <i>Turn case studies, testimonials, data sheets, and more into content that converts. Identify top content and use content downloads in automation.</i>	✓	✓
Tracking URLs <i>Track and measure effectiveness of link clicks from any URL.</i>	✓	✓
Automated Buy Signals <i>Trigger email or SMS alerts to lead owners (sales) when key buying behavior occurs.</i>	✓	✓

Feature	ProspectVision™	Lead Management Automation (LMA)™
Page Alerts <i>Get real-time notifications when people and/or businesses visit your most important web pages (pricing, contact us, etc.)</i>	✓	✓
Hot Leads Dashboard <i>Rank hot leads based on score, grade, recency, and inbound activity.</i>	✓	✓
Google Mail Integration <i>Connect email to engagement by auto-creating and tracking email recipients.</i>	✓	✓
Real-Time Google Chrome Browser Alerts <i>Get real-time notifications for email engagement, such as opens and clicks, when sending email with Send & Track.</i>	✓	✓
Outlook (PC) Integration <i>Connect email to engagement by tracking email recipients.</i>	✓	✓
Social Append <i>Pull in 1,000s of different data points (age, gender, Twitter Followers, etc.) from 100s of different social media sites to enrich records.</i>	✓ 100	500
Zap <i>Connect over 400 different applications with Lead Liaison using various triggers and actions from Zapier.</i>	✓	✓

Feature	ProspectVision™	Lead Management Automation (LMA)™
Desktop Lead Streamer <i>Stream live website traffic across your desktop or show new visitors as a popup like a chat program.</i>	✓	✓
Lead Distribution <i>Distribute leads using various criteria and methods, such as round robin, and implement SLAs with sales to keep them accountable.</i>	✓	✓
Google Analytics Integration <i>Enable UTM campaign parameters to flow into Lead Liaison and get pushed into CRM.</i>	✓	✓
Data Privacy Management <i>Capabilities to help companies execute and manage data privacy, such as those set forth by GDPR.</i>	✓	✓
Salesforce.com Connector (Bi-Directional Advanced Syncing) <i>Industry leading Salesforce.com Connector with flexible sync options.</i>	Optional	Optional
People Search <i>Search over 75M people and 10M businesses to find ideal contacts from website visitors. Push leads into your CRM or share with teammates.</i>	Optional	Optional
Custom Events <i>Log custom events, such as phone calls, searches...anything, and trigger automation actions when custom events occurs.</i>		✓

Marketing Content <i>Request marketing content such as blog posts or social posts from industry experts. Deploy it to your favorite CMS with few button clicks.</i>		✓
Feature	ProspectVision™	Lead Management Automation (LMA)™
Lead Nurturing <i>Build nurturing tracks using multi-channel touch points to build stronger relationships with prospects, customers, and partners.</i>		✓
Donations & Payments <i>Receive donations or payments, both one-time or recurring, and connect your favorite payment gateway such as Stripe or Paypal.</i>		✓
Lead Liaison Programs/Campaigns <i>Identify which marketing campaigns generated the "first touch".</i>		✓
Marketing ROI Reports <i>Measure marketing ROI to help justify results and future marketing spend.</i>		✓
Fulfillment Actions <i>Granular-level automation actions built inline with marketing assets.</i>		✓
Responsive Marketing <i>Trigger marketing actions off of prospect interactions.</i>		✓

Marketing Automation <i>Run automated marketing campaigns that simplify your life!</i>		✓
Feature	ProspectVision™	Lead Management Automation (LMA)™
Auto De-Dupe and Merge <i>De-duplicate Salesforce.com Leads and Contacts and merge records.</i>		✓
Data Import Wizard <i>Easily import contacts into the system.</i>		✓
Dynamic Segmentation <i>Auto-create lists of contact personas and keep data fresh without ever having to repeatedly create lists each time.</i>		✓
Static Segmentation <i>Create snapshots and personas of your data using social, behavior, and demographic criteria.</i>		✓
Folder Management <i>Keep marketing assets in a single place. Easily organize campaigns. Clone entire folder contents.</i>		✓
Media Manager <i>Save media to use in landing pages, email campaigns, and more.</i>		✓

Tags <i>Tag prospects manually or on import. Use tags in automation and for general filtering.</i>		✓
Feature	ProspectVision™	Lead Management Automation (LMA)™
Lists <i>Keep contacts organized in different lists.</i>		✓
Advanced Email Tests <i>Test email campaigns on 100s of different combinations of mobile, desktop, and web email clients.</i>		✓
Mobile Responsive Emails <i>Emails render beautifully on smartphones and tablets.</i>		✓
Professional-Grade Email Builder <i>Drag and drop email builder that includes an event scheduler, video embed, social share, and options to style emails in a snap.</i>		✓
A/B Testing (Email Marketing) <i>Test your email to different sample sizes and automatically send the winner to the majority.</i>		✓
Custom Unsubscribe Page <i>Brand your unsubscribe page to keep the look and feel consistent.</i>		✓

GoToWebinar Integration <i>Fully integrated with GoToWebinar to help brand and automate webinars from invite, to reminder, to follow up.</i>		✓
Feature	ProspectVision™	Lead Management Automation (LMA)™
Salesforce.com Person Account Support <i>Full integration with Salesforce.com Person Accounts.</i>		✓
Google Ads Integration <i>Identify click-throughs from Ads campaigns and measure ROI using Ad to Opportunity analysis.</i>		✓
Lead Grading <i>Grade leads from A+ to F based on ideal fit.</i>		✓
Asset-Level Lead Scoring <i>Individually score email engagement, document downloads, form submissions, and much more using granular-level lead scoring.</i>		✓
Web Form Designer <i>Drag and drop designer to build web forms. Point and click styling from the UI with support for custom fonts.</i>		✓
Landing Page Designer <i>Deploy landing pages in minutes by dragging/dropping elements onto a canvas. Import web pages as template. Landing pages are mobile responsive.</i>		✓

Handwritten Letters <i>Send letters written by real human beings, not robots. Include drop-ins like Starbucks gift cards. Send one-to-one or use as an action in automated campaigns.</i>		✓
Feature	ProspectVision™	Lead Management Automation (LMA)™
Postcards <i>Design and send postcards with an easy to use user interface. Send one-to-one or use as an action in automated campaigns.</i>		✓
Surveys <i>Create and deploy surveys in email campaigns or on your website.</i>		✓
Layout Templates <i>Add custom CSS styling for web forms or turn a web page into a landing page template.</i>		✓
Social Posting <i>Schedule, buffer, or post social messages on-demand across LinkedIn, Facebook, and Twitter accounts.</i>		✓
Custom Events <i>Log custom events, such as phone calls, searches...anything, and trigger automation actions when custom events occurs.</i>		✓
Inactivity Periods <i>Trigger actions from one or more defined periods of inactivity, i.e. decrease scoring as leads become disengaged.</i>		✓

<p>Score Thresholds</p> <p><i>Trigger actions when Prospects rise above or drop below specified scoring thresholds.</i></p>		✓
Feature	ProspectVision™	Lead Management Automation (LMA)™
<p>Interactions</p> <p><i>Measure marketing influence and overall engagement by defining your own set of interactions based in inbound and/or outbound activity.</i></p>		✓
<p>Page Patterns</p> <p><i>Page Patterns are a flexible way to trigger actions when Prospects visit web pages that match a defined pattern. Users could build a Page Pattern to add Prospects into lists, tag Prospects, send alerts to reps, and much more.</i></p>		✓

Sales Enablement

Lead Liaison created [a suite of sales solutions](#) to make life a whole lot easier for sales reps. Whether you're a seasoned rep focused on Account Based Marketing (ABM) or a business development rep focused on prospecting, our solution will enable you to sell more with less effort. Using systematic processes to accelerate sales will give your company the edge you need to win big in a competitive market.

Feature	Sales Enablement
Rhythms™ <i>Sales is all about establishing a rhythm. With the industry's only combination of offline/online sales capabilities, Lead Liaison makes account-based marketing and prospecting easy. Get ready to blow your sales quota out of the water!.</i>	✓
Native Email <i>Send email directly from a Prospect Profile. Use an inline compose window or popout version to maximize multi-tasking.</i>	✓
Two-Way Email Sync <i>Give BCC the boot! Never worry again about having to save email to a profile. Emails and threads are automatically joined to Prospect Profiles and visible in the timeline. Reply and forward straight from the timeline!</i>	✓
Smart Bcc <i>Use a single email address provided to your company in the Bcc field to save email messages into OneFocus™ and the Prospect's timeline.</i>	✓
Amazing Multi-Tasking <i>Use one or more popped-out compose windows to send email. Minimize windows to the bottom of your screen to complete other tasks. Finish your emails later!</i>	✓

<p>Schedule Email Later</p> <p><i>Write your message now and schedule it for later. Excellent for follow up. Trash the tasks and calendar reminders, automate your follow-up.</i></p>	✓
<p>Supports Every Major Email Provider</p> <p><i>Send email from anywhere, using any email provider and we'll track it! See messages and threads, track opens and replies, all in the Prospect Profile. We support Gmail, IMAP, and Microsoft Office 365 / Exchange and many more!</i></p>	✓
<p>Sales Templates</p> <p><i>Create private or shared sales email templates to easily insert into a new email compose window.</i></p>	✓
<p>Undo Sending</p> <p><i>"Ooops!" no longer. Send your email with a delay. Change your mind or have something to edit? No problem, undo your send with a simple click.</i></p>	✓
<p>Sales Snippets</p> <p><i>Insert short sentences or paragraphs (snippets) that are commonly used in your communication. Save yourself precious time and get on with selling.</i></p>	✓
<p>Email Signatures</p> <p><i>Easily insert rich-looking email signatures based on who you're sending to. Create private or shared signatures.</i></p>	✓
<p>Reminder if No Reply</p> <p><i>We track all email replies. Receive an email or Lead Liaison Task if a recipient fails to reply after a specific time period.</i></p>	✓
<p>Email Drafts</p> <p><i>Save email drafts to work on later. Compose a message, save it, then return later and pick up where you left off.</i></p>	✓

<p>Dynamic Data Merge</p> <p><i>Dynamically insert any of Lead Liaison's standard or custom field data into an email message.</i></p>	<p>✓</p>
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Event Lead Management

Powered by GoCapture!™

Lead Liaison's event lead capture solution, [GoCapture!™](#), allows users to design custom forms, instantly provision mobile devices, quickly capture leads onsite, and then immediately segment, tag, follow up with, and nurture leads without missing a beat. This application pairs with Lead Liaison's marketing automation platform, [Lead Management Automation \(LMA\)™](#) and [CRM, OneFocus™](#), allowing exhibitors to instantly capture, qualify, distribute, and nurture leads with a single system.

Feature	OneFocus™
Offline Data Collection	✓
End-to-End Event Management	✓
Runs on All Major Devices <i>(iOS, Android, smartphones and tablets)</i>	✓
Operate as a Kiosk <i>(Kiosk Mode)</i>	✓
Transcription Service or Private Transcription	✓
Lead Capture via Card Scan	✓
Lead Capture via Form Fill	✓
Lead Capture via List Pre-fill	✓
Lead Capture via Barcode / QR Code Scan	✓

Add-Ons

SiteEngage™

Lead Liaison's [SiteEngage™](#) is used to convert and engage more website visitors by dynamically serving up content. Content can be delivered embedded or in popups, what we like to call "Engagement Windows", that are personalized using intelligent rule-sets.

Feature	SiteEngage™
Ready-Made Themes	✓
Mobile Responsive	✓
Trigger on Scroll	✓
Trigger on Custom Visitor Criteria	✓
Trigger on Exit Intent	✓
Dynamic Embedded Website Content	✓
Dynamic Engagement Windows	✓
Personalizable Content	✓
Auto-Add to List	✓
Auto-Add to Automation	✓

OneFocus™ - The Free CRM

Lead Liaison's free CRM, [OneFocus™](#), enables companies to have one focus on prospects, customers, and partners. It makes data entry easy so that salespeople can be more efficient.

Feature	OneFocus™
Customizable Info Cards	✓
Rich Prospect Profiles	✓
Configurable Pipelines	✓
Organization Management	✓
Contract Management	✓
Deal Management	✓
Task Management	✓
Smart Match on Prospects	✓
Smart Match on Organizations	✓
CRM Triggers (Deals, Tasks, etc.)	✓
Smart Bcc	✓
Seamless Integration with Lead Liaison's Marketing Automation Platform	✓

Lead Liaison Revelation™

Lead Liaison [Revelation™](#) is an enterprise-grade reporting platform that allows users to see various dashboards, create custom reports, schedule reports via email, and much more.

Feature	Lead Liaison Revelation™
Customizable Reports	✓
Beautiful Ready-Made Dashboards	✓
Drill Down Reporting	✓
Schedulable Email Reports	✓
Lead Liaison Request-A-Report™	✓

People Search

People Search is Lead Liaison's solution to easily finding contacts for visiting companies. Quickly target ideal buyers from anonymous visitors and distribute leads to your team.

Feature	People Search
Push to CRM (Insightly, Base CRM, Zoho CRM, Pipedrive, Salesforce.com, Lead Liaison)	✓
Search More than 75M Contacts and 10M Associated Companies	✓
Email Contacts to Others	✓
Pull Company and Contact Info	✓

Social Append

Lead Liaison's Social Append adds 1,000s of different social data points to profiles. Social append provides more insight to sales and helps marketers use the data for targeting and retargeting in marketing campaigns.

Feature	Social Append
Pulls in 1,000s of Data Points from Publicly-available Social Profiles, Profile Photos, Basic Demographics and Social Influence.	✓
Help your Users Know More about their Prospects. Provide Context Such as Gender, Local Time, Location and Spoken Language.	✓
Use Data for Hyper-Level Targeting and Retargeting of Marketing Campaigns	✓

API

Build applications around Lead Liaison or extend functionality into your apps.

Feature	API
Lead Liaison Campaigns	✓
Domain records	✓
Email campaigns	✓
Files	✓
Page views (hits)	✓
Distributed leads	✓
Lists	✓
Prospect memberships	✓
Lead Liaison Programs	✓
Prospects	✓
Tags	✓
Templates	✓
Teams	✓
Users	✓
Videos	✓
Visits	✓

Automations	✓
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Utopia Package

The first marketing automation system you never have to touch. You request it, we make it happen!

Pick up to four (4) of the below services every month. Requires a 12 month subscription. If you do not see a service that you would like to request, please see your Lead Liaison Representative.

Setup & Planning Services	
✓	Database cleansing. Validate all your email addresses and get rid of invalid ones. Maximum 10K contacts per cleansing.
✓	Data planning. Hold a discussion about how to organize your database to start building a solution foundation.
✓	Send out a campaign to your existing database to revitalize contacts.
✓	Setup your social network accounts.
✓	Setup your DNS for email authentication and a vanity domain.
✓	Integrate Salesforce.com (requires Connector)
✓	Create a website visitor tracking filter
✓	Setup Buy Signals
✓	Assign a default lead owner
✓	Add GoToWebinar Connector
✓	Install your tracking code
✓	Import contacts into the system
Marketing Services	
✓	Queue up your first week of social posts

✓	Create database segmentations (static/dynamic)
✓	Create a birthday automation
✓	Create an automation for new customers
✓	Create an alert for Pay Per Click interest
✓	Build a survey that you can incorporate into email or an automation
✓	Set up a referral process
✓	Set up a tracking URL for partners
✓	Set up a tracking URL for online or offline campaigns
✓	Set up a lead distribution process for inbound leads
✓	Set up an initial lead scoring system
✓	Set up a lead grading process
✓	Build a website engagement dialog
✓	Build a two (2) week crash course to offer on your website
✓	Create trackable content with an option to gate the content
✓	Put a Wistia video on your website and integrate it with Lead Liaison
✓	Create a smart webform, map fields, and get it ready to deploy
✓	Add an automation around a web form submission
✓	Build an offer you can provide to people when they're about to exit your page

✓	Build a personalization block to add into your website
✓	Create a landing page
✓	Build a postcard you can add into an automation as an action step
✓	Build a text message you can add into an automation as an action step
✓	Connect any of 350 different applications to Lead Liaison using a Zapier Zap
✓	Build an automation to use after demonstrations
✓	Build an automation to use after an intro/discovery meeting
✓	Create an email template
✓	Send a targeted campaign to people that meet specific criteria
✓	Export data from the system
✓	Add tags to your 3rd party email campaign (Constant Contact, Mailchimp, etc.)
✓	Set up a responsive marketing campaign (download document X then do Y)
✓	Set up a date-based automation campaign
✓	Set up an automation that individuals can use from Google Apps for Work (Gmail), Lead
✓	Liaison, within a CRM, or a Zap
✓	Setup GoToWebinar invite process
✓	Setup GoToWebinar registration process
✓	Create a layout template

Important Notes About the Utopia Package Services:

- Services do not include creative design (graphics, etc.) or coding (CSS/HTML)
- All copy (email content, landing page content, etc.) must be provided by the customer
- Requires a valid credit card on file
- Email requests to utopia@leadliaison.com
- 48 hour delivery lead time on all services from time of request
- Services do not roll over month-to-month. If services are unused they expire
- Service period runs from the 1st of the month through the last day of the month
- If you need services not currently listed in this document please email utopia@leadliaison.com. We'll take your request into consideration