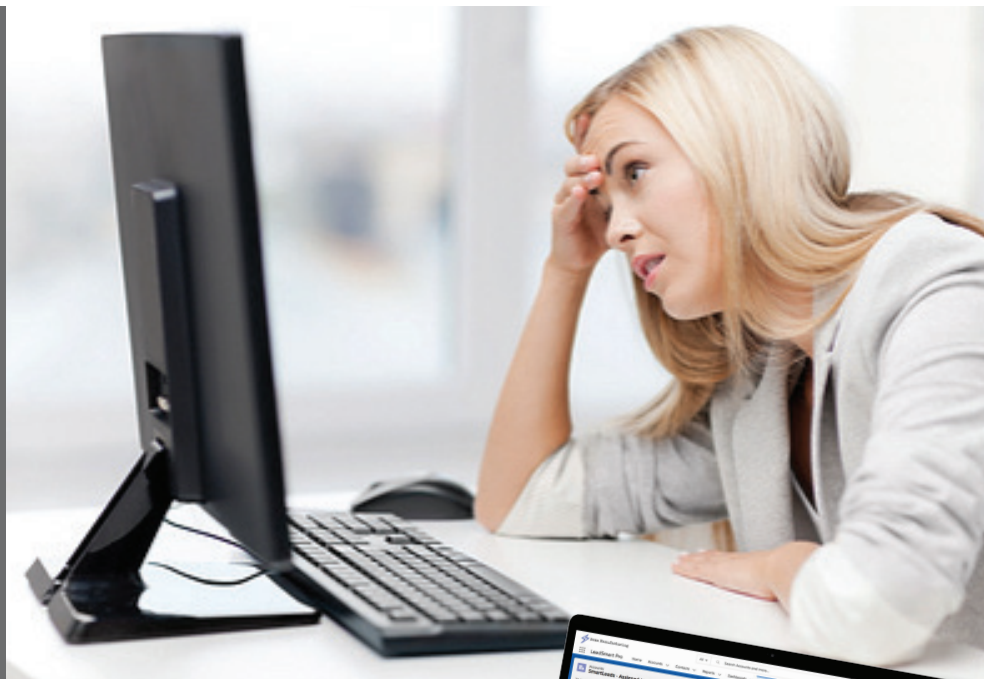


Finally a CRM/ Marketing Automation suite that teams love to use, eliminates the clutter while driving leads to revenue through an innovative partner collaboration tool, all at an affordable price!

Like you, we thought it would never come so we decided to build it!



## CRM Reimagined....

### THE CHALLENGE

- Most CRM products are designed for and marketed to Small and Midsize Businesses and are missing essential CRM features and functionality.
- Yet, the use of a full-featured enterprise CRM is over complicated and overwhelming since SMB's, as most companies, will only use a small amount of the product features.
- SMB's invest significantly in trade shows and other lead generation activities yet research says less than 1% of leads ever get converted to a customer and revenue due to a lack of automated lead development and follow up systems.
- Most SMBs sell through channels or partners yet most rely on email and spreadsheets for communication and coordination with their sales partners resulting in lost leads and poor visibility.
- The cost of a full-featured CRM system combined with a Marketing Automation system is prohibitive for most SMB's.



LeadSmart is the #1 CRM, marketing automation and partner collaboration suite for growing Small and Midsize Businesses (SMB's). LeadSmart Includes key features to help you grow your business, gain greater adoption and turn leads into revenue.

### KEY REASONS TO TRY LEADSMART

#### ① Full Featured CRM Capabilities

LeadSmart is built on the Salesforce Lightning Platform and includes all essential CRM features for SMBs.

Key features include:

- **Lead Management.** Track, assign and manage sales leads throughout the entire sales process so no lead is lost, and ROI is optimized.
- **Pipeline Management.** Manage and track the sales process through all stages of the sales pipeline, making it easy to forecast revenues and resources.
- **Account and Contact Management.** Manage customers, vendors, partners and all other accounts related to your business, manage calendars and callbacks to ensure nothing slips through the cracks.

#### • Reporting and Dashboards.

Customizable reports and dashboards where you can visually track leads and sales progress. Easy-to-create custom list views, schedule and create report subscriptions and build Kanban sales reports. You have full visibility into the sales and lead management process.

#### • Customization and Integration Capabilities.

Even though email (Outlook, Gmail, etc.), marketing automation and partner collaboration are built in or pre-integrated, you can still connect your support, ERP and hundreds of applications either native or via supported Zapier integration.

#### • Customized Salesforce Mobile App.

LeadSmart's unique capabilities, optimization, workflow, dashboards, reports and customizations are fully accessible using the standard Salesforce mobile app (iOS and Android) for full mobile access.

**② Optimized Interface, Workflows and User Experience** Most enterprise CRMs are over-engineered and too complicated for SMB's. To address this, LeadSmart has optimized and streamlined the CRM experience so it is easy to implement, easy to use and properly engineered - the right fit - for the needs of SMB's. Features include:

- **Simplified User Interface.** Modern and streamlined interface, with unnecessary functions and non-SMB clutter removed, making it much easier to learn, use and support.
- **Streamlined Sales Process.** LeadSmart fixes many typical CRM usability issues, including streamlining the sales process without requiring separate Lead and Opportunity management (you can change a "status" field vs open an entirely different and overly complicated module). Much easier to setup, train and use.
- **List View and Report Templates.** Full library of list views and reports designed specifically for SMB's and based on best practices. You have full visibility into the lead and sales management process without custom report development or coding.
- **Predefined Workflows, Rules and Triggers.** Predefined workflow templates, automated rules and triggers that follow best-in-class sales and lead management processes designed specifically for SMB's.

**③ Integrated Marketing Automation and Lead Development** LeadSmart Pro includes a fully integrated marketing automation and lead development system designed to rapidly develop and nurture prospects into "sales ready" leads. Features include:

- **Smart Automations.** Includes a full library of predefined and tested, best-practice automation templates, with built-in intelligent marketing automation for SMB lead development--requiring little interaction to generate a systematic stream of qualified leads.
- **Integrated Engagement Tracking.** Automatically tracks which prospects are engaging with marketing and lead development campaigns and which promotions are working best, including where prospects are in the sales process.

- **Full featured Email Automation.** Includes unlimited batch email capabilities, automated email/autoresponders, reporting and email list management without needing to purchase a separate email marketing system.
- **SMS, Chat Bot and Multi-Channel Capabilities.** Includes the ability to trigger multi-channel SMS, chat bot conversations, email, SMS, Facebook Messenger, What's App, Slack, and other Twilio messaging platforms--directly from Smart Automations.
- **Lead Scoring and Nurturing.** Trigger workflows and other automated nurture actions based on lead scores and content engagement, including partner lead assignments--ensuring that qualified leads are not lost.

**④ Channel Collaboration** LeadSmart Pro includes full cross-channel collaboration without the need for a separate Partner Relationship Management system. LeadSmart is able to manage and create accountability for a lead throughout the entire sales process with a focus on driving "leads 2 revenue". If you use brokers, reps, agents, dealers, distributors etc the LeadSmart Channel Collaboration tool will be a dream come true! Main features include:

- **Partner Lead Registration.** Partners can register leads which are then automatically tracked and nurtured through LeadSmart to ensure quick follow-up and increased close ratios.
- **Cross Channel Activity Management.** Tracks the entire lead and sales process between internal sales teams and an unlimited number of 3rd party partners.

- **Channel Partner Portal.** The LeadSmart Partner Portal enables 3rd party channel partners to access, track and manage assigned leads and collaborate in real-time with the internal sales teams both on desktop and mobile devices. LeadSmart makes it easy to manage leads, without using spreadsheets or email.
- **Email-based Lead Summaries and Lead Notifications.** Pre-scheduled email summaries and lead notifications are sent to channel partners based on their specific lead assignments providing detailed partner feedback on submitted leads. Avoids the time-consuming process of email or phone follow-up by partners to check their lead status.

**⑤ Price Performance Leader**

- **Affordable for Small and Midsize Businesses.** By combining CRM, marketing automation, channel collaboration and partner management into single integrated system, LeadSmart is much less costly than the combined apps it replaces.
- **Unlimited Partner and Partner Contacts.** Unlike other systems that charge per partner, LeadSmart enables you to add an unlimited number of partners and partner contacts (with access to the Partner Portal) at no additional cost.
- **Implementation and Best Practice Templates.** Included at no extra cost.
- **Can be used stand-alone, or with existing Salesforce installations.**

**LeadSmart is the #1 CRM, marketing automation and partner collaboration suite for growing SMB's.**



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