

System X Designs

# INTRO TO PROSPEX

THE CRM BUILT FOR LOCAL BUSINESS GROWTH

# WHAT IS PROSPEX?

**ProspeX** is an all-in-one Customer Relationship Management (CRM) and marketing automation platform designed specifically for local businesses, service providers, and sales-driven teams that need an easy, scalable way to generate, track, and convert leads.

Unlike traditional CRMs that are built for enterprise sales teams with long, complex deal cycles, **ProspeX** is structured for speed, automation, and simplicity—allowing businesses to efficiently manage leads, automate follow-ups, and track revenue attribution without unnecessary complexity or rising costs.





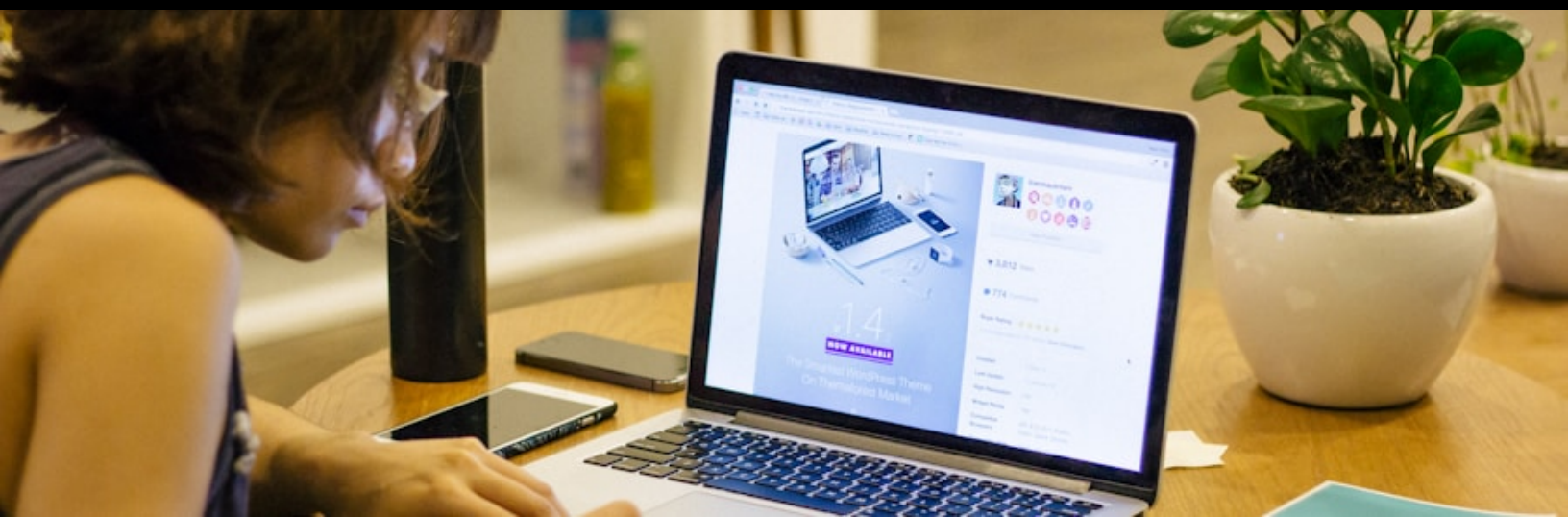
# WHY LOCAL BUSINESSES NEED PROSPEX

Most local businesses rely on fast lead response times, word-of-mouth marketing, and service-based sales. However, many CRMs are built for corporate sales teams and fail to address the unique challenges of local businesses, such as:

- **Capturing leads across multiple channels** (website, social media, phone calls, text, ads).
- **Ensuring rapid follow-ups** to prevent lost opportunities.
- **Managing multiple sales reps and locations efficiently.**
- **Tracking which marketing efforts actually generate revenue.**
- **Building automation without hiring expensive consultants.**

**ProspeX** solves these problems by providing:

- **Unlimited users & contacts** – No per-user or per-contact fees, so businesses can scale freely.
- **Full attribution reporting** – Know exactly where leads are coming from (Google, Facebook, organic search, etc.).
- **Automated lead follow-ups** – Texts, emails, and call reminders ensure no lead is forgotten.
- **AI-powered engagement tools** – Chatbots and voicemail drops to capture & nurture leads.
- **Mobile-friendly CRM** – Access leads, track pipelines, and manage sales on the go.





# HOW PROSPEX WORKS

ProspeX acts as the **central hub for lead generation, tracking, and automation**. Businesses can:

1. Capture leads through landing pages, forms, surveys, and inbound calls.
2. Assign & track leads automatically based on geography, sales rep availability, or service type.
3. Automate follow-ups with SMS, email, and AI-driven responses.
4. Monitor marketing performance with real-time analytics and attribution reporting.
5. Close more deals faster by streamlining the sales pipeline and ensuring no opportunity slips through the cracks.

## OVERVIEW

**ProspeX** is more than just a CRM—it's a complete business growth platform. By eliminating the complexity of traditional systems and replacing them with intelligent automation and user-friendly tools, ProspeX enables local businesses to convert more leads, scale efficiently, and increase revenue without extra software costs or operational bottlenecks.

If you're running a local business and struggling with lead management, marketing, or sales automation, **ProspeX** is the game-changing solution you've been waiting for.



# LEAD GENERATION & CAPTURE

For local businesses, generating leads isn't just about getting attention—it's about capturing interest, qualifying potential customers, and ensuring no opportunity is lost. **ProspeX** simplifies and automates this process by providing an all-in-one system for collecting leads from websites, social media, paid ads, inbound calls, and even AI-driven chat interactions.

Whether someone submits a form, books an appointment, or calls in with a service request, **ProspeX** ensures every lead is tracked, assigned, and followed up with in a structured, automated way.



# LANDING PAGES & FUNNELS

A well-designed landing page can be the difference between a potential customer engaging or bouncing. With **ProspeX**, businesses can quickly build high-converting landing pages without needing to code or hire a developer. These pages can be customized for specific services, promotions, or ad campaigns and integrated with lead capture forms, videos, and compelling calls to action. Businesses can also create multi-step sales funnels, guiding potential customers through an optimized journey that nurtures them toward making a decision.

# LEAD FORMS & SURVEYS

Not all leads are created equal, and **ProspeX** helps businesses qualify and segment leads upfront through customizable lead forms and surveys. Businesses can create interactive forms that ask targeted questions, filter responses based on criteria, and automatically assign high-quality leads to the right sales rep. These forms can be embedded on websites, landing pages, and social media platforms, ensuring businesses can capture leads wherever their customers are engaging.



# APPOINTMENT SCHEDULING

For businesses that rely on scheduled appointments, **ProspeX** offers an integrated calendar system that streamlines booking and follow-ups. Customers can select available time slots, book appointments without needing to call in, and receive automated SMS or email reminders to reduce no-shows. The system also syncs with Google Calendar and Outlook while intelligently assigning appointments to the appropriate team member based on location, service type, or availability.





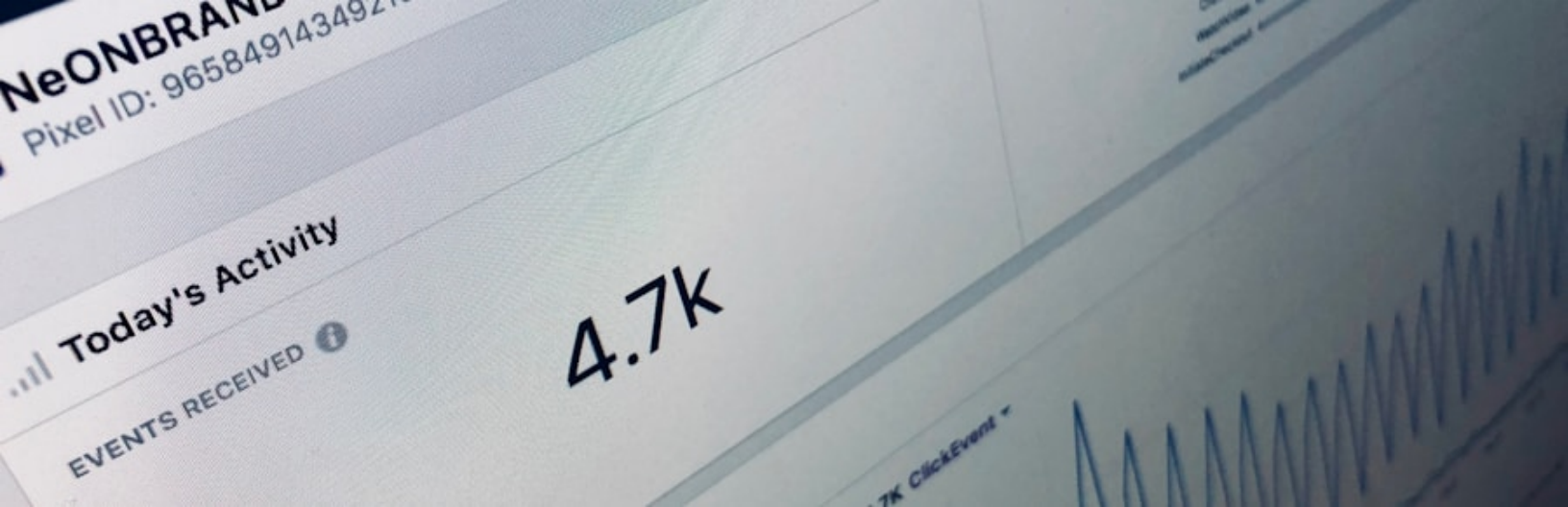
# CALL TRACKING & RECORDING

Many local businesses still receive a high volume of leads from phone calls, but without proper tracking, those leads can easily slip through the cracks. ProspeX ensures that every inbound call is logged as a lead and stored within the CRM, including details like call duration, source, and even recorded audio for future reference. This allows businesses to monitor call quality, analyze sales interactions, and track which marketing campaigns are generating calls. Call forwarding and IVR (Interactive Voice Response) capabilities further enhance customer experience and lead management efficiency.

# AI-POWERED CHATBOTS

Today's consumers expect quick responses, and AI-powered chat can bridge the gap when sales teams aren't immediately available. ProspeX includes 24/7 chatbots that engage website visitors, capture lead information, and even schedule appointments automatically. These chatbots work across websites, Facebook Messenger, and SMS, ensuring that businesses can capture leads around the clock. With intelligent AI responses, customers can get their questions answered in real-time while being seamlessly guided toward booking a service or requesting a follow-up.





# LEAD CAPTURE FROM SOCIAL MEDIA & ADS

Many local businesses invest in paid advertising but struggle to track how well those ads convert. **ProspeX** solves this by integrating directly with Facebook and Instagram lead ads, automatically syncing new leads into the CRM without manual entry. Additionally, leads generated through Google Search Ads, Display Ads, and Local Service Ads are tracked with full attribution, making it easy to see which marketing channels are delivering the best return on investment. Businesses can also retarget website visitors using tracking pixels, keeping their brand in front of potential customers who didn't convert on their first visit.

## WHY IT MATTERS

**ProspeX** eliminates manual lead entry, scattered data, and lost opportunities by centralizing all lead sources into a single, easy-to-manage system. With automated tracking, assignment, and follow-up reminders, businesses never have to worry about missing out on a potential customer. By reducing response times and structuring the lead capture process, businesses can increase conversion rates, maximize their marketing ROI, and grow faster—without extra administrative overhead.

# B2B PROSPEX

## SMART PROSPECTING FOR B2B

Finding the right customers is one of the biggest challenges for local businesses offering B2B services. B2B ProspeX, a built-in feature of ProspeX, makes it easy to identify, connect with, and engage potential clients in any industry and any location. Whether you're targeting contractors, medical offices, retail chains, or service providers, B2B ProspeX provides real-time access to decision-makers and the ability to launch automated outreach campaigns—without manual research or data entry.

## HOW IT WORKS

**B2B ProspeX** gives businesses the power to search for companies within a chosen geographic area and industry, instantly pulling up a list of potential clients along with key decision-makers at each business. This means your sales team can stop wasting time on outdated lists and instead work with fresh, verified data on businesses that match your ideal customer profile.



Once the right prospects are identified, B2B ProspeX allows users to immediately launch targeted outreach campaigns. Whether through email, SMS, or phone, businesses can engage decision-makers at scale with personalized, automated messaging designed to convert leads into real opportunities.

# KEY FEATURES OF B2B PROSPEX

- **Find Ideal B2B Customers Instantly** – Search for businesses by industry, location, and niche, ensuring every lead is relevant.
- **Identify Key Decision-Makers** – Gain access to business owners, managers, or other relevant contacts within a company.
- **Automate Outreach Campaigns** – Start email, SMS, or call campaigns directly from the prospecting tool, so leads don't get lost in the process.
- **No More Manual Data Entry** – Contacts are automatically stored in your CRM, ready for immediate follow-up or long-term nurturing.
- **Real-Time, Updated Data** – Stop relying on outdated lead lists and ensure your sales team is working with accurate, up-to-date business information.



# WHY IT MATTERS FOR LOCAL BUSINESSES

**B2B ProspeX** removes the guesswork from prospecting, allowing local businesses to scale faster, book more appointments, and close more deals—without spending hours on manual outreach. Whether you're an equipment rental company, a commercial service provider, or any other B2B business, this tool ensures you're always in front of the right customers at the right time.

- **Save Time on Prospecting** – Instead of manually searching for leads, sales teams can generate entire prospect lists in seconds.
- **Improve Sales Efficiency** – Decision-makers can be contacted immediately, reducing the time between identification and first touch.
- **Increase Conversion Rates** – With built-in automation, businesses can nurture leads consistently, increasing the chances of closing more deals.
- **Expand Into New Markets** – Quickly find potential customers in new territories or industries, opening up new revenue streams.





# LEAD MANAGEMENT & ATTRIBUTION

Generating leads is just the first step—**turning them into paying customers requires a structured approach to tracking, assigning, and following up.** ProspeX ensures that no lead falls through the cracks by providing a **fully automated system for lead management, assignment, and attribution tracking.** With built-in reporting, businesses can **see exactly where their leads are coming from, track follow-ups, and measure the true return on investment (ROI) of their marketing efforts.**



# AUTOMATED LEAD ASSIGNMENT & TRACKING

When leads enter the system—whether from **web forms, call inquiries, landing pages, or ad campaigns**—ProspeX automatically **assigns them to the appropriate sales rep or team**. Assignments can be based on **geographic territory, service type, or round-robin distribution**, ensuring that leads are handled by the right people without manual intervention.

Every lead is logged in a central dashboard, where businesses can:

- **See the source of every lead** (Google Ads, organic search, referrals, direct calls, etc.).
- **Track lead status** as it moves through the sales pipeline.
- **Assign and reassign leads** to specific sales reps as needed.
- **Monitor follow-up activity**, ensuring no lead is forgotten.



# FULL ATTRIBUTION REPORTING: KNOW WHAT'S DRIVING REVENUE

One of the biggest frustrations for local businesses is **not knowing which marketing efforts are actually bringing in customers**. ProspeX eliminates this guesswork by providing **detailed attribution tracking** on every lead.

- **Track lead sources with precision** – Know whether a customer came from Google Search, Facebook Ads, organic traffic, email campaigns, direct calls, or referrals.
- **Connect ad spend to actual revenue** – See which marketing channels are converting into real sales, allowing for smarter budget allocation.
- **Offline Attribution Integration** – Capture leads from in-person visits, direct calls, and offline referrals and attribute them within the system.
- **Comprehensive Analytics Dashboard** – View real-time insights into lead conversion rates, sales team performance, and overall marketing effectiveness.





# SALES PIPELINE & CRM INTEGRATION

Once a lead is captured and assigned, ProspeX makes it easy to **move them through the sales process**. The built-in pipeline allows businesses to:

- **Create and customize sales stages** to match their workflow.
- **Monitor where leads are in the buying process** and set automated reminders for follow-ups.
- **See which deals are in progress, which have been won, and which have been lost.**
- **Generate reports on sales rep performance**, helping management identify strengths and areas for improvement.




# WHY IT MATTERS FOR LOCAL BUSINESSES

With **ProspeX**, lead management and attribution are no longer a guessing game. Every lead is tracked from start to finish, giving businesses clear visibility into their sales process and marketing ROI. This allows local businesses to operate more efficiently, close more deals, and grow revenue—without wasting money on ineffective marketing strategies.

- **Eliminates manual tracking** – No more spreadsheets or sticky notes; everything is logged and automated.
- **Ensures leads get followed up on** – Every sales rep is accountable for their assigned leads, and managers can monitor progress.
- **Optimizes marketing spend** – Businesses can invest in the strategies that work and cut the ones that don't.
- **Increases conversion rates** – Leads that are quickly assigned and followed up with are far more likely to convert into paying customers.





# MARKETING AUTOMATION & OUTREACH

For local businesses, speed is everything when it comes to converting leads into customers. If a potential customer expresses interest and doesn't get a quick response, they'll likely move on to a competitor. **ProspeX** eliminates slow follow-up times and inconsistent outreach by fully automating marketing, communication, and lead nurturing—allowing businesses to engage prospects immediately and stay top-of-mind.

With built-in automation for SMS, email, voicemail drops, AI-powered chat, and social media messaging, businesses can create consistent, personalized interactions at scale—without the manual effort.



# MULTI-TOUCH NURTURING CAMPAIGNS

Not all leads convert immediately, which is why **consistent follow-ups are essential**. ProspeX allows businesses to create **multi-step marketing campaigns** that automatically engage leads over time. Instead of relying on sales teams to manually track and follow up, ProspeX ensures that leads receive:

- **Personalized email sequences** with relevant offers, reminders, and educational content.
- **Scheduled SMS messages** to check in and encourage further engagement.
- **Automated call reminders** for sales reps to re-engage high-value prospects.
- **Social media message automation**, keeping leads engaged across multiple platforms.

By automating follow-ups and nurturing, ProspeX helps businesses stay in front of potential customers until they're ready to buy.





# INSTANT FOLLOW-UPS:

## ENGAGE PROSPECTS BEFORE THEY LOSE INTEREST

When a new lead enters the system, ProspeX can **automatically trigger a follow-up sequence** to engage them right away. Whether the lead came from a website form, an ad campaign, or an inbound call, businesses can set up:

- **Instant SMS replies** welcoming the prospect and confirming their inquiry.
- **Automated emails** introducing services and providing next steps.
- **Voicemail drops** that deliver a pre-recorded message from the business owner or sales rep.
- **AI-powered chat responses** that answer common questions and guide leads to book an appointment or consultation.



# REPUTATION MANAGEMENT

## AUTOMATING REVIEW REQUESTS

Positive online reviews are crucial for local businesses, yet many don't have a structured process for requesting them. **ProspeX** automates the review collection process, helping businesses increase their ratings and build trust.

- **Daily review request automation:** Customers who complete a purchase or service receive an SMS or email asking for a review.
- **Google & Facebook integration:** Direct customers to leave reviews on the most visible platforms.
- **Customizable messaging:** Adjust review requests based on customer experience and interactions.
- **Branch-level tracking:** Monitor ratings and identify which locations need improvement.

The more positive reviews a business collects, the better it ranks in search results—leading to more leads and higher conversion rates.

# WHY IT MATTERS FOR LOCAL BUSINESSES

By automating marketing and outreach, **ProspeX** allows businesses to focus on what matters most—serving customers and closing deals. With a structured follow-up system in place, businesses can increase engagement, boost revenue, and maximize their marketing ROI with minimal effort.

- **Automates lead follow-ups**, reducing the risk of lost opportunities.
- **Keeps prospects engaged over time**, leading to higher conversion rates.
- **Improves response time**, ensuring businesses connect with leads before competitors do.
- **Simplifies outreach and marketing**, making it easy to scale sales efforts.







# **SALES ENABLEMENT & CRM FUNCTIONS**

For local businesses, having the right leads is only part of the equation—success depends on how efficiently those leads are managed, nurtured, and converted into customers. ProspeX provides a fully integrated CRM designed to help sales teams stay organized, track opportunities, and close more deals with less effort.

With automated workflows, intuitive pipeline management, and real-time reporting, ProspeX ensures that every lead is properly followed up on, sales reps stay accountable, and businesses have a clear view of their revenue pipeline.

# PIPELINE MANAGEMENT

## KNOW WHERE EVERY DEAL STANDS

A cluttered or disorganized sales process leads to missed opportunities and lost revenue. ProspeX eliminates the guesswork by providing a clear, visual pipeline that tracks every lead and deal in real time.

- **Customizable Sales Stages** – Businesses can define their own deal stages to reflect their specific sales process.
- **Drag-and-Drop Lead Movement** – Move leads seamlessly through the pipeline as they progress through the sales cycle.
- **Automated Status Updates** – Triggers can update lead statuses automatically based on actions, such as booking an appointment or responding to a follow-up message.
- **Probability Tracking** – Assign percentages to each deal stage to forecast revenue more accurately.

With a structured pipeline in place, sales teams can focus on closing deals instead of chasing leads.



# TASK & REMINDER AUTOMATION

## NEVER MISS A FOLLOW-UP

One of the biggest reasons deals fall through is lack of follow-up. Sales reps get busy, forget to check in with prospects, or don't have a clear system for tracking next steps. **ProspeX** solves this by automating follow-up tasks and reminders.

- **Automated Task Assignments** – When a lead reaches a certain stage, ProspeX can create tasks for sales reps with due dates and reminders.
- **Customizable Follow-Up Sequences** – Businesses can set up predefined outreach cadences to ensure every lead is contacted the right number of times.
- **Real-Time Alerts & Notifications** – Sales reps get instant reminders when it's time to call, email, or visit a prospect.
- **Pipeline-Based Prioritization** – Sales teams can focus on high-value opportunities first with built-in prioritization tools.

With automated task management, no lead is ever forgotten, and follow-ups happen on time—every time.





# CONTACT & ACCOUNT MANAGEMENT

## A FULL VIEW OF EVERY CUSTOMER

Tracking individual leads is important, but understanding the full history of interactions with a customer is even more valuable. ProspeX gives businesses a complete contact management system that stores every conversation, appointment, purchase, and follow-up in one place.

- **Centralized Customer Profiles** – Each lead and customer has a detailed record with call logs, email history, SMS messages, and past interactions.
- **Notes & Attachments** – Sales reps can add notes and upload files to provide context on customer needs, quotes, and contracts.
- **Multiple Contacts Per Business** – B2B businesses can track multiple decision-makers within the same company.
- **Smart Segmentation** – Filter contacts based on activity, lead source, or pipeline stage for more targeted outreach.

By keeping all customer data organized and easily accessible, ProspeX ensures that sales teams always have the information they need to close deals effectively.



# REAL-TIME REPORTING & SALES PERFORMANCE TRACKING

Sales teams thrive when they can measure performance and optimize their approach. ProspeX includes real-time reporting dashboards that provide insights into:

- **Sales Rep Performance** – Track calls, follow-ups, and closed deals per rep.
- **Pipeline Value & Forecasting** – Know how much revenue is in the pipeline and predict future sales.
- **Lead Source Effectiveness** – Identify which marketing efforts bring in the highest-converting leads.

With detailed analytics, business owners and sales managers can make data-driven decisions, optimize sales strategies, and improve team performance.



# WHY IT MATTERS FOR LOCAL BUSINESSES

With ProspeX's powerful CRM and sales enablement tools, local businesses can run a more efficient, results-driven sales process—without the complexity of traditional enterprise software. Sales teams stay focused on closing deals, and business owners get the visibility they need to scale their operations successfully.

- **Eliminates lost leads** – No more forgotten follow-ups or missed opportunities.
- **Improves team accountability** – Sales reps can track and measure their own performance.
- **Streamlines the entire sales process** – From first contact to closed deal, every step is organized.
- **Boosts revenue** – Faster follow-ups and a structured pipeline lead to higher conversion rates.





# ADS MANAGER X

## AI ADVERTISING MADE SIMPLE

Advertising can be one of the most effective ways to generate leads for a business—but it's also one of the most complicated. Managing ads across Google, YouTube, Facebook, Instagram, and TikTok requires constant optimization, targeting, and tracking to get results. **Ads Manager X**, a native function within **ProspeX**, removes the complexity by using AI-driven automation to create, launch, and optimize ad campaigns—without needing a full-time ad specialist.

With **Ads Manager X**, businesses can run professional, high-performing ad campaigns in just a few clicks, allowing them to focus on serving customers while the system drives new leads on autopilot.

# EFFORTLESS AD CREATION & SETUP

Most advertising platforms require complicated setups, audience targeting, and budget adjustments to be effective. Ads Manager X eliminates that hassle by simplifying the entire process with an intuitive, step-by-step system.

- **No Experience Needed** – Set up ads in minutes with an easy-to-follow process.
- **AI-Driven Audience Targeting** – Automatically finds the best audience based on business type and location.
- **Pre-Built Ad Templates** – Save time with proven ad formats designed for conversions.
- **Budget Control** – Set daily and total spending limits to maximize ad performance while staying within budget.

Businesses can quickly launch ads across multiple platforms, ensuring they reach their ideal customers no matter where they are.







# MULTI-PLATFORM ADVERTISING FROM ONE DASHBOARD

Instead of managing separate campaigns for each platform, Ads Manager X centralizes everything into one simple dashboard, allowing businesses to run ads on:

- **Google Search & Display** – Get in front of people actively searching for services.
- **YouTube Ads** – Use video ads to capture attention and build brand awareness.
- **Facebook & Instagram Ads** – Target local audiences with engaging visual content.
- **TikTok Ads** – Reach new customers through short-form video marketing.
- **Many Other Options** – LinkedIn, Spotify, Call Ads, Maps Ads, Local Service Ads, and more

By automating ad creation, targeting, and optimization, Ads Manager X ensures that businesses spend less time managing campaigns and more time growing their revenue.

# AI-POWERED OPTIMIZATION & AUTOMATION

Running successful ad campaigns isn't just about launching ads—it's about constant testing and optimization. **Ads Manager X** leverages AI-powered automation to ensure that campaigns perform at their best.

- **Automated Performance Adjustments** – Ads Manager X continuously analyzes performance and makes real-time optimizations.
- **Smart Budget Allocation** – Redirects ad spend toward the best-performing campaigns and audiences.
- **A/B Testing & Learning Algorithms** – Tests different ad variations to find the highest-converting creatives and messaging.
- **Real-Time Analytics & Insights** – Provides easy-to-understand reports on ad performance, lead generation, and return on investment (ROI).

With hands-free campaign management, businesses can achieve better results with lower costs—without needing to hire an ad agency.



# WHY IT MATTERS FOR LOCAL BUSINESSES

With **Ads Manager X**, local businesses can reach more customers, generate more leads, and increase revenue—without wasting time or money on complicated ad platforms. It's the easiest, smartest way to scale paid advertising while staying focused on business growth.

- **Eliminates the need for expensive ad agencies** – Businesses can launch high-quality ads in minutes without advanced expertise.
- **Saves time with automation** – No need to monitor or adjust campaigns daily—Ads Manager X optimizes everything.
- **Maximizes ad budget efficiency** – AI-driven learning ensures that every dollar spent is going toward high-performing campaigns.
- **Integrates directly with ProspeX** – Every lead is tracked, assigned, and nurtured automatically.





# REPORTING & ANALYTICS

For local businesses, knowing what's working and what's not is critical to maximizing revenue and scaling efficiently. Many businesses spend money on marketing and sales efforts without clear visibility into which strategies are generating actual results. ProspeX solves this by providing real-time reporting and analytics that track every lead, conversion, and revenue source—giving businesses the insights they need to make smarter decisions, optimize spending, and drive growth.





# FULL-FUNNEL LEAD ATTRIBUTION

## SEE WHERE EVERY LEAD COMES FROM

One of the biggest challenges for local businesses is understanding which marketing channels are actually driving new customers. ProspeX provides full attribution tracking that tells you exactly where your leads originated—whether from Google Search, paid ads, social media, direct calls, referrals, or email campaigns.

- **Real-time tracking for all lead sources** – Know exactly how many leads come from Google, Facebook, organic search, direct traffic, and more.
- **Attribution at the contact level** – Every lead in ProspeX is automatically tagged with its source, ensuring full transparency.
- **Offline attribution included** – Capture leads from in-person visits, phone calls, and word-of-mouth referrals and track them just like digital leads.
- **Multi-touch attribution** – See the full customer journey and how multiple touchpoints influence conversions.

This level of granular attribution ensures that businesses are only spending money on what actually works—eliminating wasted ad spend and improving return on investment (ROI).

# SALES PIPELINE & CONVERSION REPORTING

Tracking leads is one thing—knowing how well they convert into actual sales is even more important. **ProspeX** includes a fully customizable sales pipeline with built-in reporting, so businesses can:

- Monitor how many leads progress through each stage of the sales funnel.
- Identify bottlenecks in the sales process and adjust strategies accordingly.
- Track conversion rates from lead to customer across different sources.
- Measure the effectiveness of follow-ups and response times.

With a clear view of where leads are stalling, sales teams can focus on optimizing follow-up strategies and closing more deals.



# REVENUE TRACKING & ROI ANALYSIS

At the end of the day, marketing and sales efforts should generate measurable revenue. **ProspeX** allows businesses to track how much revenue is generated from each campaign, channel, and sales rep.

- **Connect marketing spend to actual revenue** – Understand which campaigns are bringing in paying customers.
- **Break down revenue by lead source** – See whether organic traffic, paid ads, referrals, or outbound efforts are driving the most sales.
- **Calculate Return On Ad Spend (ROAS)** – Directly measure how much money is made for every dollar spent on advertising.
- **Monitor sales rep performance** – Track which reps are closing the most deals and where improvements are needed.

Instead of guessing where revenue is coming from, businesses get hard data to inform future growth strategies.





# DETAILED PERFORMANCE DASHBOARDS & REPORTS

Manually pulling reports is time-consuming and inefficient. **ProspeX** automates reporting, providing real-time dashboards that display key performance metrics in a clear, actionable format.

- **Customizable dashboards** – Set up reports to show the exact data that matters most.
- **Automated email reports** – Get scheduled reports sent directly to business owners, managers, or sales reps.
- **Drill-down analytics** – Dive deep into specific campaigns, sales reps, or lead sources for in-depth insights.
- **Year-over-year & month-over-month comparisons** – Identify long-term trends and seasonal fluctuations.

By simplifying reporting, businesses can make data-driven decisions without spending hours compiling numbers.





# WHY IT MATTERS TO LOCAL BUSINESSES

With ProspeX's advanced reporting and analytics, local businesses can finally take control of their sales and marketing efforts with full transparency. By understanding what drives revenue and what doesn't, they can grow smarter, scale faster, and maximize their profitability.

- **Ensures marketing dollars are spent wisely** – No more guessing which campaigns are working.
- **Optimizes the sales process** – Identify weak points and improve lead-to-customer conversion rates.
- **Increases profitability** – Businesses can double down on successful efforts and cut ineffective ones.
- **Provides real-time insights** – No waiting for end-of-month reports—businesses can adjust strategies on the fly.





# INTEGRATIONS & API

For local businesses, efficiency comes from having all their tools seamlessly connected—eliminating the need to manually transfer data between systems. **ProspeX** is built with deep integrations into the most widely used platforms, ensuring that businesses can connect their CRM, marketing, and operational workflows into a single, unified system.

Additionally, for businesses that require custom solutions, **ProspeX** offers an API that allows for deeper automation, data synchronization, and third-party tool integrations.

# AUTOMATED DATA SYNCHRONIZATION & WORKFLOWS

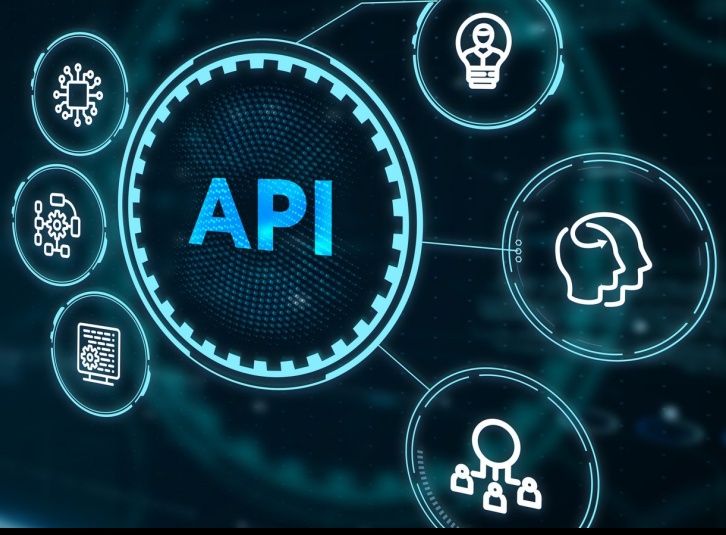
By integrating with marketing, sales, and payment processing platforms, **ProspeX** enables businesses to:

- **Automatically sync lead data** from ad campaigns, websites, and social media.
- **Trigger email or SMS sequences** based on customer actions, such as filling out a form or booking an appointment.
- **Push customer data into QuickBooks or Stripe** for streamlined billing and invoicing.
- **Update contact records across all connected tools** without manual intervention.

With intelligent automation handling repetitive tasks, businesses can focus more on closing deals and serving customers rather than managing systems.







# PROSPEX API

## CUSTOM INTEGRATIONS FOR ADVANCED USE CASES

For businesses that require even more control over their workflows, **ProspeX** offers a robust API that allows for:

- **Custom data syncing** between ProspeX and external software.
- **Automated lead distribution** to other CRM systems or sales platforms.
- **Real-time event triggers** that can initiate custom workflows based on user actions.
- **Bulk data imports and exports** for enterprise-level reporting or migration needs.

The API ensures that **ProspeX** can be customized to fit the exact needs of any business, whether it's integrating with proprietary systems or streamlining multi-location operations.



# WHY IT MATTERS FOR LOCAL BUSINESSES

With seamless integrations and a powerful API, **ProspeX** becomes the central hub for all customer interactions and business processes. Local businesses no longer have to rely on disconnected systems or struggle with data silos—everything works together to drive growth and streamline operations.

- **Eliminates manual data entry** – Automatically syncs information across platforms, saving time and reducing errors.
- **Increases efficiency** – Sales and marketing teams can focus on lead conversion rather than administrative tasks.
- **Improves lead response time** – Instant data transfers mean that new inquiries can be acted on immediately.
- **Customizable for any business model** – Whether a small business or a multi-location enterprise, ProspeX adapts to specific needs.





# MOBILE APP

## ACCESS & USABILITY

In today's fast-paced business environment, sales teams and business owners need access to their CRM and communication tools anytime, anywhere. ProspeX is built with full mobile functionality, allowing users to manage leads, follow up with prospects, track sales pipelines, and automate outreach—all from their smartphone or tablet.

With a dedicated mobile app, ProspeX ensures that local businesses can stay connected, responsive, and productive—even when they're away from their desk.

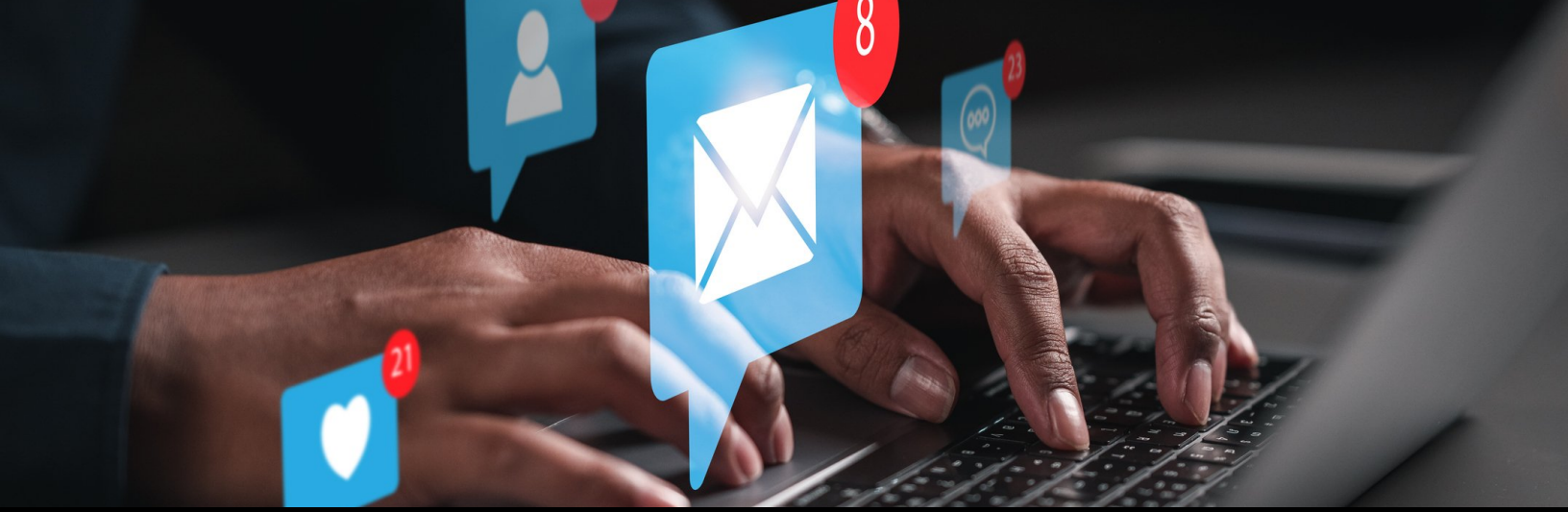
# FULL CRM ACCESS FROM ANY DEVICE

Unlike many CRMs that have limited mobile functionality, **ProspeX** provides a seamless experience across desktop, tablet, and mobile devices. This means businesses can:

- **View and update contact records** in real time.
- **Track leads and deals** within the sales pipeline.
- **Schedule and manage appointments** on the go.
- **Send follow-up emails, texts, or calls** directly from the mobile app.
- **Assign leads and tasks** to team members without needing to log in from a desktop.

With everything available in the palm of your hand, teams can manage their workflow efficiently from anywhere.





# INSTANT NOTIFICATIONS

## REAL-TIME LEAD ALERTS

Timing is critical in sales, and the faster a business follows up with a lead, the higher the likelihood of closing the deal. **ProspeX** sends real-time push notifications whenever a new lead is captured, an appointment is booked, or a follow-up task is due.

- **Lead notifications** ensure sales reps can reach out immediately.
- **Task reminders** keep follow-ups on schedule.
- **Missed call alerts** prompt users to return calls and avoid lost opportunities.

These instant updates allow businesses to be more responsive and provide a better experience for potential customers.



# MOBILE CALLING, TEXTING, & EMAIL AUTOMATION

**ProspeX** eliminates the need for third-party apps by allowing users to call, text, or email leads directly from the mobile CRM.

- **One-click calling** lets users reach prospects instantly while tracking call activity.
- **Automated SMS sequences** keep leads engaged without manual texting.
- **Pre-built email templates** allow for quick, professional communication.

Since all interactions are automatically logged in the CRM, businesses can maintain a complete history of conversations and follow-ups—ensuring no lead gets overlooked.





# ON-THE-GO PIPELINE & REVENUE TRACKING

For business owners and sales managers, ProspeX's mobile app provides a full view of sales performance in real time.

- **Monitor deals in progress** and see which sales reps are closing the most business.
- **Check revenue forecasts and pipeline health** at any time.
- **Adjust lead assignments or follow-ups** with just a few taps.

By providing instant access to key metrics, businesses can make informed decisions without needing to be in the office.

# WHY IT MATTERS FOR LOCAL BUSINESSES

With full mobile access, **ProspeX** ensures that local businesses never miss a lead, always stay connected, and can manage their sales process from anywhere. Whether in the office, on a job site, or meeting with clients, the power of **ProspeX** is always at their fingertips.

- **Increases responsiveness** – Faster lead follow-ups lead to higher conversion rates.
- **Improves team efficiency** – Sales reps can manage leads and tasks wherever they are.
- **Reduces lost opportunities** – No more waiting until "back at the office" to engage leads.
- **Simplifies communication** – All calls, texts, and emails are handled in one platform.





# VOICE AI XPERT

## THE SMARTEST VIRTUAL EMPLOYEE FOR YOUR BUSINESS

Handling inbound calls efficiently is one of the biggest challenges for businesses, especially when missed calls, long hold times, and repetitive questions drain productivity and lead to lost sales. **Voice AI Xpert**, a fully integrated AI-powered voice assistant, ensures that every call is answered, every lead is qualified, and every customer inquiry is handled professionally—24/7.

With advanced AI-driven call handling, lead qualification, and sales automation, **Voice AI Xpert** doesn't just answer the phone—it acts as a true virtual employee, designed to convert inquiries into revenue.



# 24/7 AVAILABILITY

## NEVER MISS A CALL AGAIN

Unlike human employees who need breaks, sleep, and time off, **Voice AI Xpert** is always on. Whether it's during peak business hours or in the middle of the night, every caller is greeted with a professional, responsive assistant that ensures no opportunity is lost.

- **Handles unlimited inbound calls** at any time of day or night.
- **Reduces voicemail reliance** by engaging with customers immediately.
- **Provides immediate answers** to common customer questions.
- **Improves customer satisfaction** with consistent, prompt responses.

Customers no longer have to wait on hold, leave voicemails, or get frustrated by unanswered calls.





# SMART CALL HANDLING & LEAD QUALIFICATION

**Voice AI Xpert** is trained to understand business-specific products, services, and customer needs so that it can accurately qualify leads and handle common inquiries. Businesses can customize the AI's training to ensure it asks the right questions and directs callers appropriately.

- **Qualifies leads automatically** by gathering essential information.
- **Filters high-quality prospects** before sending them to a sales rep.
- **Routes calls based on urgency** (e.g., new sales vs. existing customer support).
- **Live transfers** qualified leads or urgent calls to a human representative.

By automating lead qualification and call routing, businesses free up employees to focus on closing deals rather than answering basic questions.

# SALES & APPOINTMENT

## BOOKING AUTOMATIONS

**Voice AI Xpert** isn't just a virtual receptionist—it's a sales assistant that can schedule appointments, provide pricing, and even close deals.

- **Guides customers through the sales process** by answering objections and providing detailed information.
- **Books appointments directly** in the business's calendar based on availability.
- **Upsells and cross-sells** based on caller intent and business preferences.

Whether it's a customer looking to book a service, request a quote, or get product details, **Voice AI Xpert** ensures they get exactly what they need—without requiring a live employee.







# REDUCES REPETITIVE FAQs

## SAVES EMPLOYEE TIME & ENERGY

For businesses that receive a high volume of frequently asked questions, **Voice AI Xpert** can be trained to answer 85% or more of customer inquiries—eliminating the need for employees to repeatedly answer the same questions.

- **Provides technical product specifications** without requiring human intervention.
- **Answers common service-related questions** (pricing, availability, hours, etc.).
- **Handles warranty, shipping, and return questions** without escalating to a live rep.
- **Saves staff time**, allowing them to focus on higher-value tasks.

Instead of tying up employees with routine inquiries, **Voice AI Xpert** ensures they spend time where it matters most—closing deals and serving customers.



# LIVE TRANSFERS

## WORKFLOW AUTOMATIONS

While **Voice AI Xpert** can handle most interactions independently, it seamlessly hands off to a live representative whenever needed.

- **Transfers callers to a human rep** if a question is outside its training.
- **Routes sales-qualified leads** to the appropriate team member for closing.
- **Initiates workflows** such as sending follow-up texts, emails, or appointment confirmations.
- **Notifies employees via email or CRM updates** when a high-priority lead calls.

This ensures that while AI handles routine inquiries, human representatives step in only when their expertise is needed.





# CALL TRANSCRIPTIONS & SUMMARIES

Every call handled by **Voice AI Xpert** is automatically transcribed and logged, providing full visibility into conversations and ensuring no details are lost.

- **Full call transcriptions** are added as notes to the caller's contact record.
- **Summarized call reports** can be emailed to designated employees.
- **Tracks customer inquiries over time**, helping businesses refine responses and optimize customer service.

By automating documentation and call tracking, businesses never lose valuable lead details or sales insights.



# WHY BUSINESSES NEED VOICE AI XPERT

With **Voice AI Xpert**, businesses no longer struggle with missed calls, overwhelmed employees, or inefficient phone handling. Instead, they have a powerful AI-driven assistant that works around the clock to engage customers, generate leads, and drive revenue.

- **Never miss a lead**—every call is answered instantly.
- **Save staff time** by automating frequently asked questions.
- **Increase sales** by qualifying leads and guiding them through the buying process.
- **Reduce operational costs** by handling calls without additional staff.
- **Ensure seamless customer experience** with 24/7 professional call handling.





# PRE-BUILT CUSTOMIZATIONS

## FUNCTIONALITY BUILT FOR EASE OF USE

One of the biggest challenges for local businesses is managing lead follow-up, outreach, and customer engagement efficiently without overwhelming their team. Many businesses lose leads simply because they don't have the time or systems in place to handle every inquiry, verify contact details, and track responses.

**ProspeX** solves this by providing built-in automation tools that eliminate manual processes, reduce workload, and ensure that every lead receives fast, accurate engagement. These pre-built functions come ready to use inside the CRM, meaning businesses don't need expensive third-party tools or additional integrations—everything is already optimized for efficiency and growth.





# ATTRIBUTION REPORTING

## KNOW WHERE EVERY LEAD COMES FROM

Understanding which marketing efforts are driving leads and revenue is critical for optimizing ad spend and sales strategies. **ProspeX** automatically tracks every lead's source and connects that data to conversion rates, helping businesses see exactly which campaigns, platforms, and efforts are working.

- **Real-Time Source Tracking** – Every new lead is tagged with the exact source it came from (Google Ads, Facebook, organic search, direct calls, referrals, etc.).
- **Multi-Touch Attribution** – See the full customer journey and how different marketing touchpoints contributed to a sale.
- **Offline Attribution** – Capture walk-in leads, direct phone calls, and word-of-mouth referrals to track non-digital conversions.
- **ROI Reporting** – Connect marketing spend directly to revenue to measure return on investment (ROI) and optimize ad budgets.

This ensures businesses don't waste money on campaigns that aren't bringing in high-quality leads.

# EMAIL DELIVERABILITY

## IMPROVE DELIVERABILITY & REDUCE SPAM

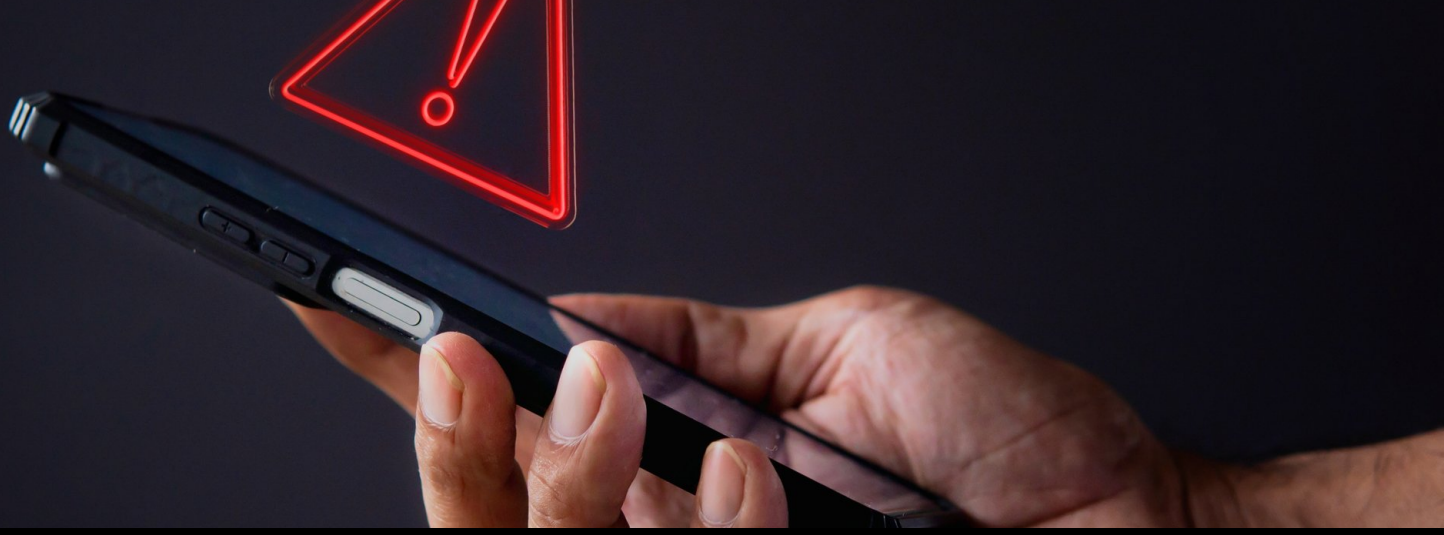
Email marketing and outreach campaigns are only effective if emails actually reach real inboxes. Many businesses struggle with high bounce rates, emails landing in spam, and poor sender reputation. **ProspeX** automatically verifies email addresses before sending, improving delivery rates and ensuring better engagement.

- **Removes Invalid Emails** – Flags fake, expired, or mistyped email addresses before outreach.
- **Prevents Bounces & Spam Triggers** – Verifies inbox activity to ensure emails reach real people.
- **Reduces Wasted Outreach** – Focuses email campaigns on valid, engaged leads.
- **Protects Sender Reputation** – Avoids blacklists and spam filters, improving open and response rates.

By ensuring only real, verified contacts are targeted, businesses can increase their email marketing ROI and improve customer engagement.







# PHONE TYPE & CARRIER DETECTION

## ENSURE SMS & CALL ACCURACY

Not all phone numbers are the same—some can receive texts, some can't, and some are tied to spam or temporary VoIP services. **ProspeX** automatically detects the type of phone number before outreach, improving SMS campaign effectiveness and call connection rates.

- **Identifies Mobile, Landline, or VoIP Numbers** – Ensures that SMS campaigns only go to mobile users for better response rates.
- **Filters Out Temporary & Spam Numbers** – Detects VoIP or disposable numbers to focus outreach on real prospects.
- **Optimizes Sales Calls** – Sales teams can prioritize mobile and business numbers, reducing wasted calls to inactive lines.
- **Improves SMS Deliverability** – Ensures messages are only sent to numbers that can actually receive them.

This feature saves time, reduces failed outreach attempts, and increases engagement with real prospects.

# COLD EMAIL CAMPAIGNS

## AUTOMATE B2B OUTREACH AT SCALE

Prospecting is essential for B2B businesses, but manual outreach is slow and inefficient. **ProspeX** automates cold email campaigns with personalized, high-converting sequences that engage decision-makers and increase response rates.

- **Pre-Built Email Sequences** – Ready-to-use outreach templates for lead generation, follow-ups, and appointment setting.
- **Personalized at Scale** – Automatically fills in details like {{first\_name}}, {{company\_name}}, and {{industry}} to make emails feel customized.
- **Optimized Sending Strategy** – Smart scheduling and automation ensure emails are sent at the best times for engagement.
- **Built-In A/B Testing** – Tests subject lines and messaging to find the highest-performing variations.

Instead of spending hours manually prospecting, businesses can run automated campaigns that generate leads on autopilot.







# MISSED CALL TEXT BACK

## ENGAGE CUSTOMERS INSTANTLY

Every missed call is a missed opportunity. Most customers won't leave a voicemail or call back later—they'll move on to a competitor. **ProspeX** solves this by automatically sending a personalized text message to missed calls, ensuring customers still feel acknowledged and engaged.

- **Instant Automated Text Replies** – If a business is unavailable to answer, the system sends a pre-written text back to the caller.
- **Customizable Messaging** – Tailor messages based on business hours, service type, or urgency.
- **Appointment Booking Links** – Include a direct link for customers to schedule a call-back or service.
- **Sales & Support Routing** – Direct urgent inquiries to the appropriate contact to prevent lost leads.

By responding immediately to missed calls, businesses can recover lost opportunities and increase customer satisfaction.

# AI POWERED CHATBOTS

## CAPTURE & QUALIFY LEADS 24/7

Many businesses lose leads outside of business hours because there's no one available to respond. **ProspeX** solves this with AI-powered chatbots that engage visitors, answer questions, and capture leads automatically.

- **24/7 Lead Capture** – Even when the business is closed, the chatbot collects customer details and schedules follow-ups.
- **Smart Qualification** – Automatically asks qualifying questions to prioritize high-value leads.
- **Instant CRM Sync** – Captured leads are immediately added to the pipeline for follow-up.
- **Omni-Channel Engagement** – Works across websites, Facebook Messenger, and SMS.

By ensuring every inquiry receives an immediate response, businesses increase engagement and conversion rates.





# REPUTATION MANAGEMENT

## AUTOMATE REVIEW REQUESTS

Positive online reviews are critical for local businesses, but many don't have a structured system for collecting them. **ProspeX** automates the process, ensuring happy customers leave reviews that boost credibility and SEO rankings.

- **Automatic Review Requests** – Sends a follow-up text or email after a purchase or service.
- **Google & Facebook Integration** – Directs customers to leave reviews on high-visibility platforms.
- **Filters Negative Feedback** – Unhappy customers are redirected to support before posting a negative review.
- **Branch-Level Tracking** – Monitor ratings for each location and track improvements over time.

The more positive reviews a business collects, the higher it ranks—leading to more leads and better conversions.



# LEAD SCORING & SMART FILTERING

Not all leads are equally valuable. ProspeX **automatically scores and prioritizes leads** based on engagement, activity, and conversion potential, helping sales teams focus on the **best opportunities first**.

- **Intelligent Lead Scoring** – Assigns scores based on lead source, interactions, and responsiveness.
- **Smart Filtering** – Filters out spam, duplicate, or low-quality leads before they reach sales teams.
- **Custom Criteria** – Businesses can define scoring rules based on their own sales process.
- **Automated Follow-Ups** – High-scoring leads can be fast-tracked for immediate sales outreach.

This feature ensures sales teams spend time on leads that actually convert, rather than wasting effort on cold or unqualified prospects.

