callbox Pipeline

Cloud-Based Lead Management and Marketing Automation

Get your marketing running on all gears.

Callbox Pipeline is our multi-touch, multi-channel, web-based marketing automation tool that integrates call center power with lead management, campaign monitoring and cross-channel marketing automation.

Lead Management

- **Sales Funnel** – Track leads from capture to close
- **Contact Info and History** – Store and update contact information , and view past communications with each lead
- **Lead Assignment** – Assign leads to multiple sales agents
- **Event Calendar** – You and your sales people can block-out dates and times to indicate to your Callbox team your availability for appointments. Be notified of appointments via the Event Calendar's real-time alerts and alarms
- **Map** – Find the location of your next appointment with the Map feature

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Campaign Monitoring

- **Call Feeds** – View at anytime recent calls made by your Callbox representative
- **Weekly Status Reports** – Regular weekly email reports on the status of leads and appointments, and recommendations to further improve success rates
- **Email Response Management and Reporting** – Statistics are tracked and reported for every mailing (Delivered, Opens, Replies); we also detect instances of Opened Emails and conduct follow-up calls to all those who opened the emails
- **Export Feature** – Download your custom reports in CSV format

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Cross-Channel
Marketing Automation

Telemarketing and Email Campaign

- Call-and-Send
- Genius Send
- Alarms for Opens
- Email Marketing Automation
- Trigger-based Actions

LinkedIn integration

- Profile Lookup
- Invite to Connect

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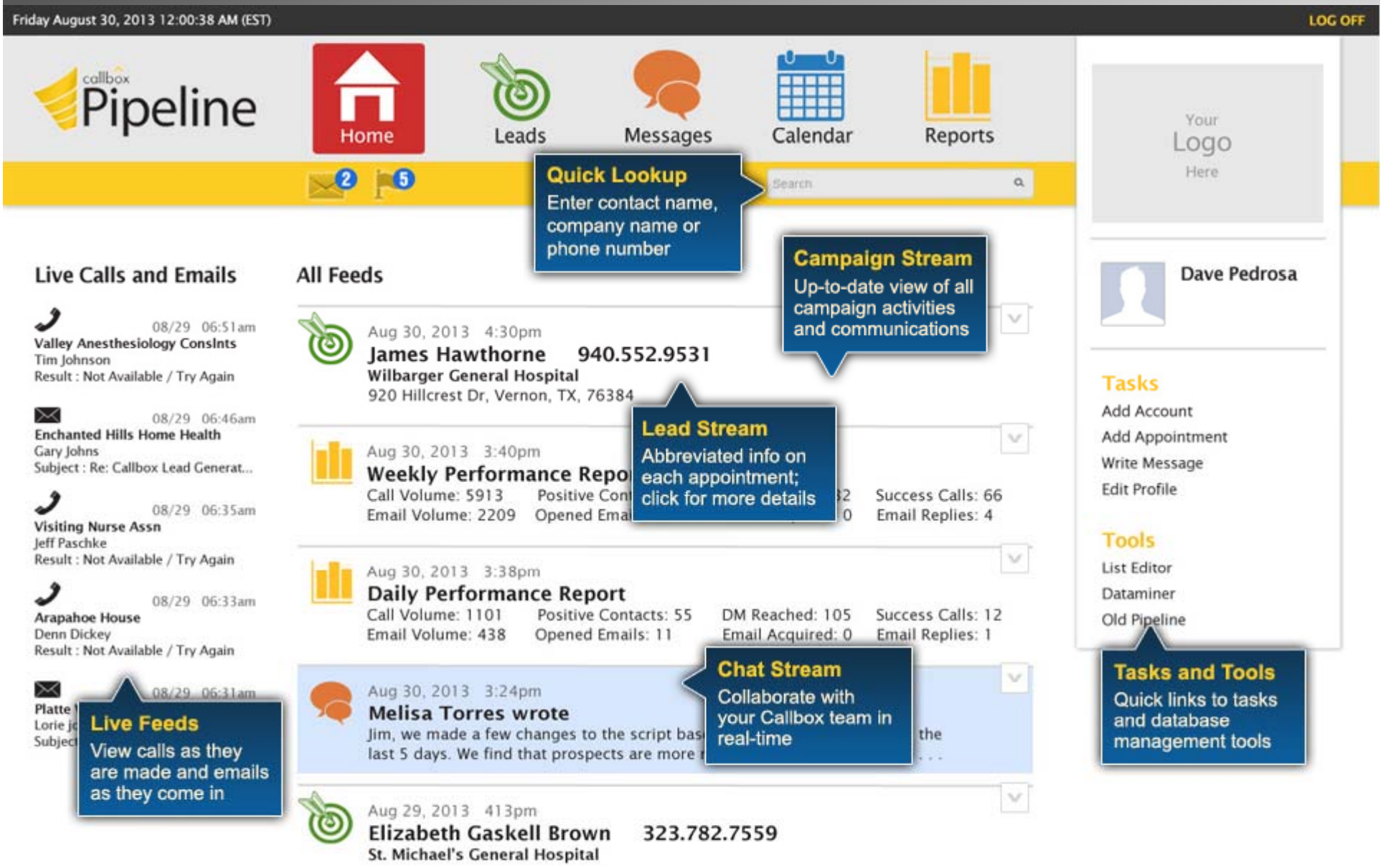
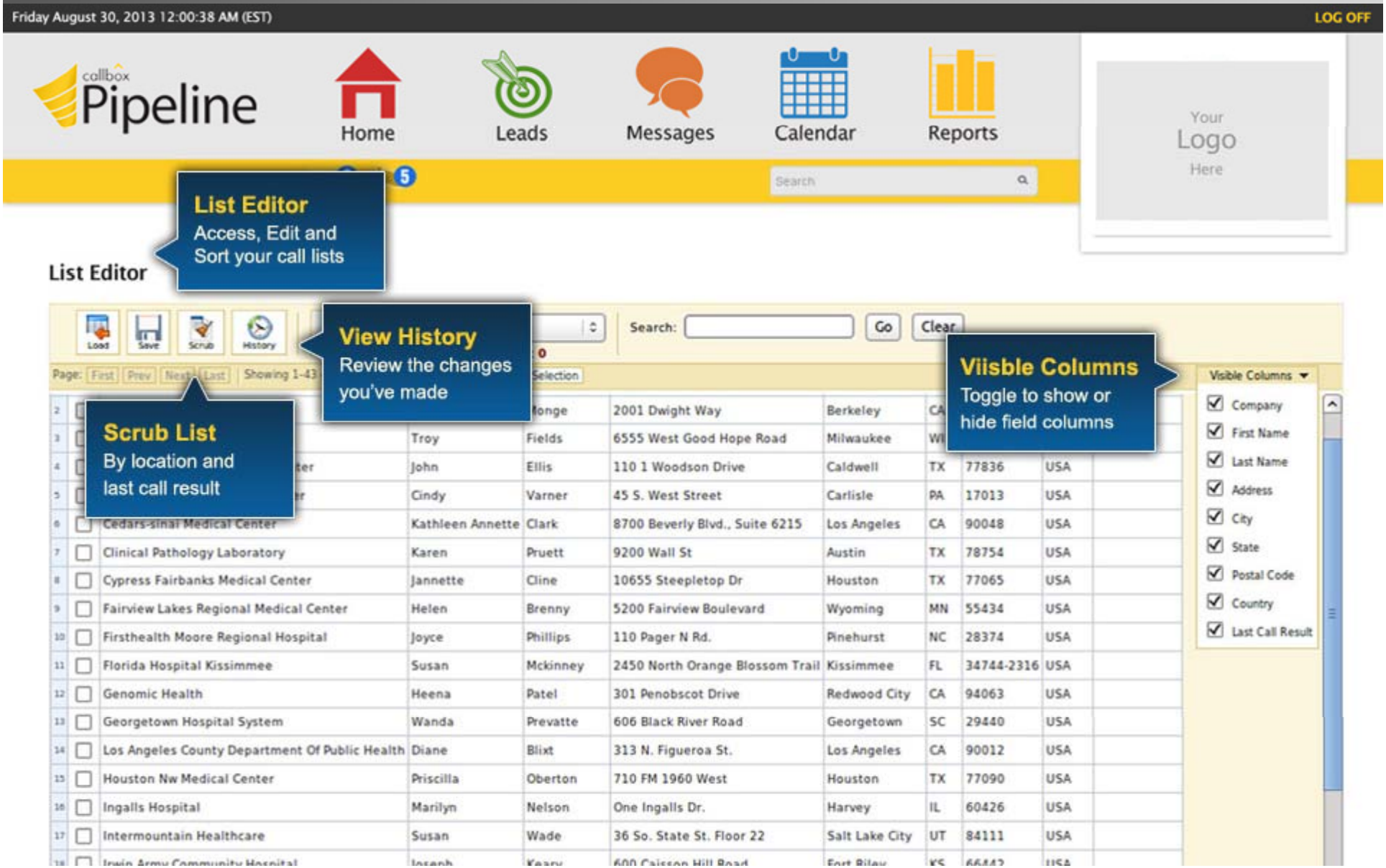
Pipeline Home



Pipeline Appointment Details

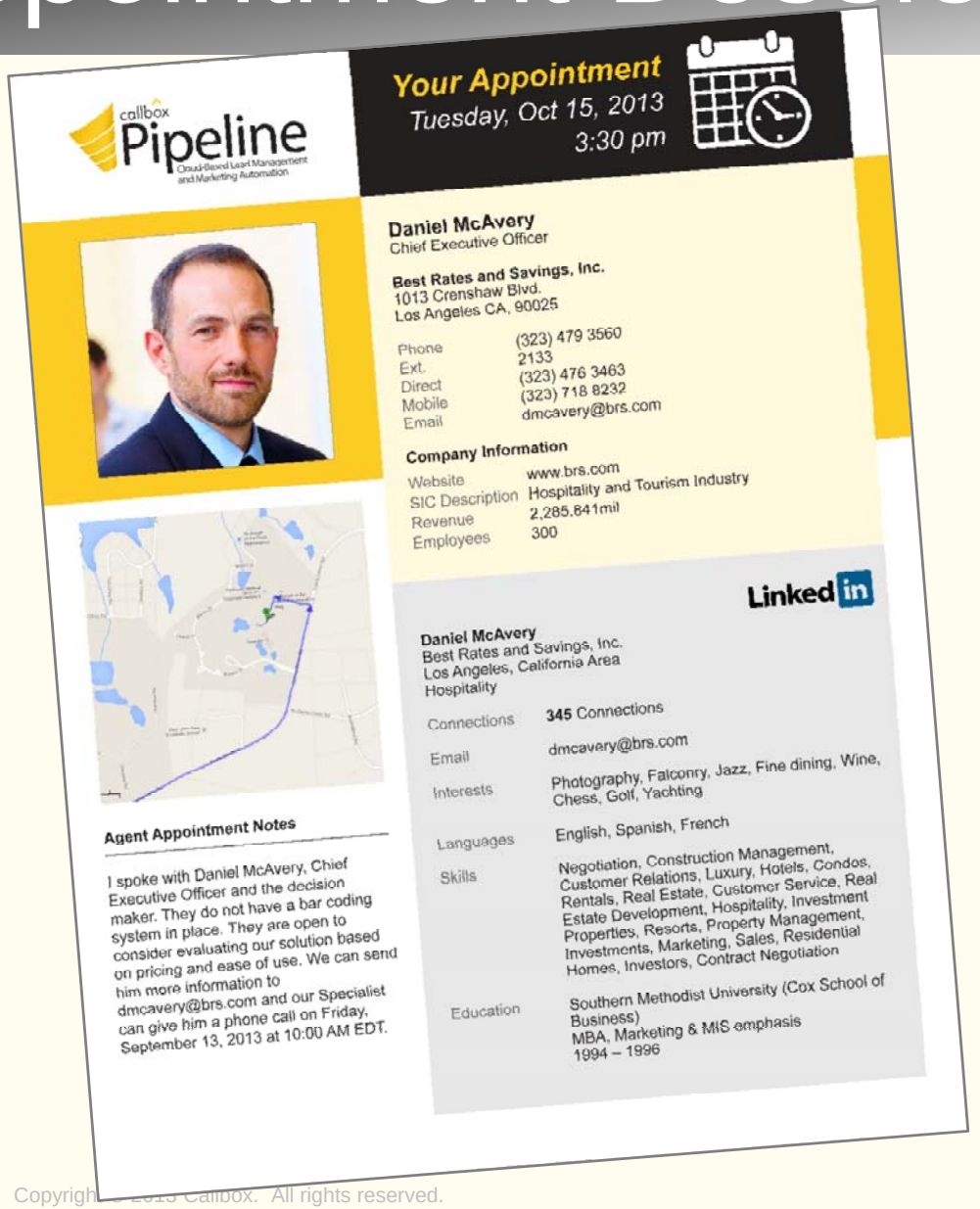
Pipeline Reports

Pipeline List Editor



				2001 Dwight Way	Berkeley	CA		
	Troy	Fields	6555 West Good Hope Road	Milwaukee	WI			
	John	Ellis	110 1 Woodson Drive	Caldwell	TX	77836	USA	
	Cindy	Varner	45 S. West Street	Carlisle	PA	17013	USA	
Cedars-sinai Medical Center	Kathleen Annette	Clark	8700 Beverly Blvd., Suite 6215	Los Angeles	CA	90048	USA	
Clinical Pathology Laboratory	Karen	Pruett	9200 Wall St	Austin	TX	78754	USA	
Cypress Fairbanks Medical Center	Jannette	Cline	10655 Steepletop Dr	Houston	TX	77065	USA	
Fairview Lakes Regional Medical Center	Helen	Brenny	5200 Fairview Boulevard	Wyoming	MN	55434	USA	
Firsthealth Moore Regional Hospital	Joyce	Phillips	110 Pager N Rd.	Pinehurst	NC	28374	USA	
Florida Hospital Kissimmee	Susan	Mckinney	2450 North Orange Blossom Trail	Kissimmee	FL	34744-2316	USA	
Genomic Health	Heena	Patel	301 Penobscot Drive	Redwood City	CA	94063	USA	
Georgetown Hospital System	Wanda	Prevatte	606 Black River Road	Georgetown	SC	29440	USA	
Los Angeles County Department Of Public Health	Diane	Blixt	313 N. Figueroa St.	Los Angeles	CA	90012	USA	
Houston Nw Medical Center	Priscilla	Oberton	710 FM 1960 West	Houston	TX	77090	USA	
Ingalls Hospital	Marilyn	Nelson	One Ingalls Dr.	Harvey	IL	60426	USA	
Intermountain Healthcare	Susan	Wade	36 So. State St. Floor 22	Salt Lake City	UT	84111	USA	

Pipeline Appointment Dossier



Print a dossier for easy reference whenever you go to your appointment.

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Contact Us

Phone				
	USA	+1 888.810.7464	Singapore	+65 6248.5023
	UK	+44 203.002.5986	Malaysia	+60 3.2772.7370
	Australia	+1 300.505.804	Hong Kong	+852 3.6786708
	New Zealand	+64 9.9143122		

Email info@callboxinc.com
sales@callboxinc.com

Website www.CallboxInc.com

facebook.com/Callbox

twitter.com/Callboxinc

linkedin.com/company/callbox

gplus.to/Callbox

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