



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



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



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

Pipeline Home

Friday August 30, 2013 12:00:38 AM (EST)

LOG OFF



Quick Lookup

Enter contact name, company name or phone number

Search

Campaign Stream

Up-to-date view of all campaign activities and communications

Lead Stream

Abbreviated info on each appointment; click for more details

Chat Stream

Collaborate with your Callbox team in real-time

Live Calls and Emails

08/29 06:51 am
Valley Anesthesiology Conslnts
Tim Johnson
Result : Not Available / Try Again

08/29 06:46 am
Enchanted Hills Home Health
Gary Johns
Subject : Re: Callbox Lead Generat...

08/29 06:35 am
Visiting Nurse Assn
Jeff Paschke
Result : Not Available / Try Again

08/29 06:33 am
Arapahoe House
Denn Dickey
Result : Not Available / Try Again

08/29 06:31 am
Platte
Lorie Johnson
Subject : ...

Live Feeds

View calls as they are made and emails as they come in

All Feeds

Aug 30, 2013 4:30pm
James Hawthorne 940.552.9531
Wilbarger General Hospital
920 Hillcrest Dr, Vernon, TX, 76384

Aug 30, 2013 3:40pm
Weekly Performance Report
Call Volume: 5913 Positive Contacts: 12 Success Calls: 66
Email Volume: 2209 Opened Emails: 0 Email Replies: 4

Aug 30, 2013 3:38pm
Daily Performance Report
Call Volume: 1101 Positive Contacts: 55 DM Reached: 105 Success Calls: 12
Email Volume: 438 Opened Emails: 11 Email Acquired: 0 Email Replies: 1

Aug 30, 2013 3:24pm
Melisa Torres wrote
Jim, we made a few changes to the script based on the feedback from the last 5 days. We find that prospects are more interested in the ...

Aug 29, 2013 4:13pm
Elizabeth Gaskell Brown 323.782.7559
St. Michael's General Hospital



Dave Pedrosa

Tasks

- Add Account
- Add Appointment
- Write Message
- Edit Profile

Tools

- List Editor
- Dataminer
- Old Pipeline

Tasks and Tools

Quick links to tasks and database management tools

Pipeline Appointment Details

Friday August 30, 2013 12:00:38 AM (EST)

LOG OFF



Search



Your Logo Here

Daniel McAvery

Edit

Chief Executive Officer at Best Rates and Savings
1013 Crenshaw Blvd, Los Angeles CA, 90025

[Map](#) | [Direction](#)

Phone: (323) 479 3560 Email: dmcavery@
Ext.: 2133 Email: dmcavery@gmail.com
Direct: (323) 476 3463 Website: [www.brs.com](#)
Mobile: (323) 718 8232

[LinkedIn](#) | [View Profile](#) | [Invite to Connect](#)

Prefix: 91 93 95

LinkedIn Integration

Invite your prospect to connect on LinkedIn

Dial

Hangup

Change Status

Appointment Set by TM to

Notes

Document Lead Updates
with Pipeline status tags and notes

Update Status

History

Reset Appointment - Sales has reset the appointment

Sep 19, 2013 2:00 PM

Date Last Updated: September 18, 2013, 1:27 am

Reset Appointment - Sales has reset the appointment

Sep 14, 2013 10:00 AM

Date Last Updated: September 13, 2013, 1:27 am

First Appointment - Appointment Set by TM

Sep 13, 2013 10:00 AM

Date Last Updated: September 12, 2013

[View earlier](#)

Contact History

Review all previous calls and emails with your prospect



Dave Pedrosa

Tasks

- Add Account
- Add Appointment
- Write Message
- Edit Profile

Tools

- List Editor
- Dataminer
- Old Pipeline

Pipeline Reports

Friday August 30, 2013 12:00:38 AM (EST)

LOG OFF



Home



Leads



Messages



Calendar



Reports



Search



Your Logo Here

Live Calls and Emails

08/29 06:51am
Valley Anesthesiology Consints
Tim Johnson
Result : Not Available / Try Again

08/29 06:46am
Enchanted Hills Home Health
Gary Johns
Subject : Re: Callbox Lead Generat...

08/29 06:35am
Visiting Nurse Assn
Jeff Paschke
Result : Not Available / Try Again

08/29 06:33am
Arapahoe House
Denn Dickey
Result : Not Available / Try Again

08/29 06:31am
Platte Valley Medical Ctr
Lorie Johnson
Subject : Target List Criteria

Reports



Aug 30, 2013 3:00pm

Weekly Performance Report

Call Volume: 5913 Positive Contacts: 264 DM Reached: 532 Success Calls: 66
Email Volume: 2209 Opened Emails: 45 Email Acquired:



Aug 30, 2013

Daily Performance Report

Call Volume: 1101 Positive Contacts: 55 DM Reached: 100 Success Calls: 12
Email Volume: 438 Opened Emails: 11 Email Acquired: 0 Email Replies: 1



Aug 29, 2013 3:00pm

Daily Performance Report

Call Volume: 1101 Positive Contacts: 55 DM Reached: 100 Success Calls: 12
Email Volume: 438 Opened Emails: 11 Email Acquired: 0 Email Replies: 1



Aug 28, 2013 3:00pm

Daily Performance Report

Call Volume: 1101 Positive Contacts: 55 DM Reached: 105 Success Calls: 12
Email Volume: 438 Opened Emails: 11 Email Acquired: 0 Email Replies: 1



Aug 27, 2013 3:00pm

Daily Performance Report

Call Volume: 1101 Positive Contacts: 55 DM Reached: 105 Success Calls: 12

Month-to-Date Summary Report
Generate success rates, list profile, etc.

Reports Stream
Up-to-date view of all daily and weekly performance reports

Lead Supply and Sales Report
List all appointments and closed sales

Detailed Performance
List contacts w/ latest call results and notes by your Callbox agent



Dave Pedrosa

Reports

Month-to-Date Summary
Lead Supply and Sales Report
Detailed Performance Report
Custom Reports

Tasks

Add Account
Add Appointment
Write Message
Edit Profile

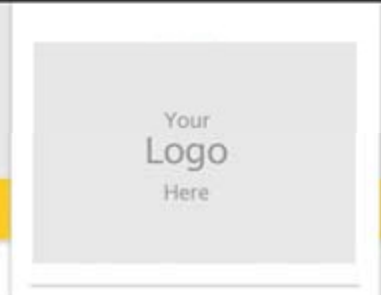
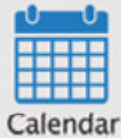
Tools

List Editor
Dataminer
Old Pipeline

Pipeline List Editor

Friday August 30, 2013 12:00:38 AM (EST)

LOG OFF



List Editor

Access, Edit and Sort your call lists

List Editor



View History

Review the changes you've made

Scrub List


By location and last call result

Visible Columns



Toggle to show or hide field columns

Selection	Company	First Name	Last Name	Address	City	State	Postal Code	Country	Last Call Result
<input type="checkbox"/>	Longe	Troy	Fields	2001 Dwight Way	Berkeley	CA			
<input type="checkbox"/>		John	Ellis	6555 West Good Hope Road	Milwaukee	WI			
<input type="checkbox"/>		Cindy	Varner	110 1 Woodson Drive	Caldwell	TX	77836	USA	
<input type="checkbox"/>		Kathleen Annette	Clark	45 S. West Street	Carlisle	PA	17013	USA	
<input type="checkbox"/>	Cedars-sinai Medical Center			8700 Beverly Blvd., Suite 6215	Los Angeles	CA	90048	USA	
<input type="checkbox"/>	Clinical Pathology Laboratory	Karen	Pruett	9200 Wall St	Austin	TX	78754	USA	
<input type="checkbox"/>	Cypress Fairbanks Medical Center	Jannette	Cline	10655 Steepletop Dr	Houston	TX	77065	USA	
<input type="checkbox"/>	Fairview Lakes Regional Medical Center	Helen	Brenny	5200 Fairview Boulevard	Wyoming	MN	55434	USA	
<input type="checkbox"/>	Firsthealth Moore Regional Hospital	Joyce	Phillips	110 Pager N Rd.	Pinehurst	NC	28374	USA	
<input type="checkbox"/>	Florida Hospital Kissimmee	Susan	Mckinney	2450 North Orange Blossom Trail	Kissimmee	FL	34744-2316	USA	
<input type="checkbox"/>	Genomic Health	Heena	Patel	301 Penobscot Drive	Redwood City	CA	94063	USA	
<input type="checkbox"/>	Georgetown Hospital System	Wanda	Prevatte	606 Black River Road	Georgetown	SC	29440	USA	
<input type="checkbox"/>	Los Angeles County Department Of Public Health	Diane	Blixt	313 N. Figueroa St.	Los Angeles	CA	90012	USA	
<input type="checkbox"/>	Houston Nw Medical Center	Priscilla	Oberton	710 FM 1960 West	Houston	TX	77090	USA	
<input type="checkbox"/>	Ingalls Hospital	Marilyn	Nelson	One Ingalls Dr.	Harvey	IL	60426	USA	
<input type="checkbox"/>	Intermountain Healthcare	Susan	Wade	36 So. State St. Floor 22	Salt Lake City	UT	84111	USA	
<input type="checkbox"/>	Inaia Senu Community Hospital	Inaia	Keane	600 Colson Hill Road	East Bilau	NC	66667	USA	

Pipeline Appointment Dossier



Your Appointment
Tuesday, Oct 15, 2013
3:30 pm



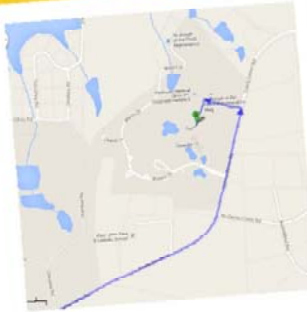
Daniel McAvery
Chief Executive Officer

Best Rates and Savings, Inc.
1013 Crenshaw Blvd.
Los Angeles CA, 90025

Phone (323) 479 3560
Ext. 2133
Direct (323) 476 3463
Mobile (323) 718 8232
Email dmcavery@brs.com

Company Information

Website www.brs.com
SIC Description Hospitality and Tourism Industry
Revenue 2,285.841mil
Employees 300



Agent Appointment Notes

I spoke with Daniel McAvery, Chief Executive Officer and the decision maker. They do not have a bar coding system in place. They are open to consider evaluating our solution based on pricing and ease of use. We can send him more information to dmcavery@brs.com and our Specialist can give him a phone call on Friday, September 13, 2013 at 10:00 AM EDT.

Linked in

Daniel McAvery
Best Rates and Savings, Inc.
Los Angeles, California Area
Hospitality

Connections **345 Connections**

Email dmcavery@brs.com

Interests Photography, Falconry, Jazz, Fine dining, Wine, Chess, Golf, Yachting

Languages English, Spanish, French

Skills Negotiation, Construction Management, Customer Relations, Luxury, Hotels, Condos, Rentals, Real Estate, Customer Service, Real Estate Development, Hospitality, Investment Properties, Resorts, Property Management, Investments, Marketing, Sales, Residential Homes, Investors, Contract Negotiation

Education Southern Methodist University (Cox School of Business)
MBA, Marketing & MIS emphasis
1994 – 1996

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

Contact Us

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facebook.com/Callbox



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linkedin.com/company/callbox



gplus.to/Callbox