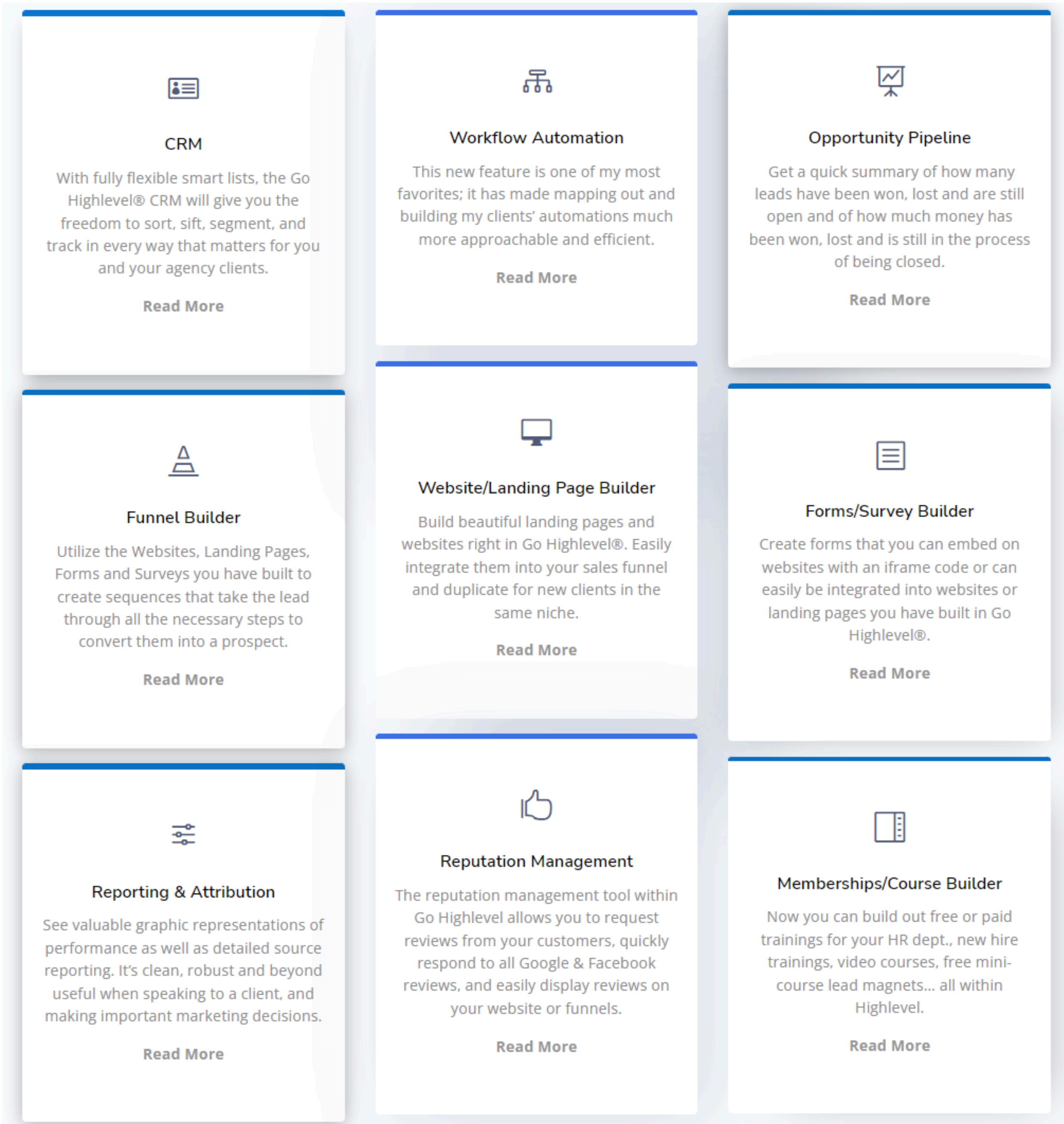


- Smart Lists
- Tags
- Bulk Actions
- Importing/Exporting
- 2-Way Texting
- Phone
- Email
- Centralized Communication
- Appointment Setting

- GMB Messaging
- FB Messenger
- Notes
- Tasks
- Attribution Tracking
- Text2pay
- Custom Field Access
- Instagram DM

SMART LISTS: The ability to create detailed smart lists is paramount when it comes to segmenting leads and managing custom actions to each group. Filter by anything you can think to create with custom fields and tags, and access them easily.

The smart lists feature is how you are able to set up bulk actions where you can manually send out an email or SMS to multiple people in a smart list. It also is helpful when adding bulk tags, changing pipeline status or adding to a workflow.

You are able to create global lists or specific lists per user. You can customize what you see in the columns to include custom fields.

TAGS: Drive automations off of a tag system that can give you very detailed control over your triggers and automated marketing campaigns. You can manage all of your tags in settings and see them all in one spot. You can add a tag individually per contact via bulk action or from an automation.

BULK ACTIONS: From the CRM, you are able to manage a number of bulk actions, saving time and energy and maintaining a high level of control. This is great for one-off needs or random updates to your list. You are able to see the bulk request and status as well as if there were any errors after sending. You are able to do things like change pipeline stage, add to workflow, send SMS or email, add/remove tags, bulk delete and export/import contacts.

IMPORTING & EXPORTING CONTACTS: With the capacity to allow for unlimited contacts, Sales2Scale@ makes importing and exporting CSV files seamless. Sales2Scale does a great job of allowing you to create and map fields upon import and add tags, which is helpful for staying organized with each list that you import.

If you want a redundant copy of all contacts you can set up an automation via zapier to send all contacts to a google sheet, if desired.

2-WAY TEXTING: Phone and SMS are powered by Twilio and allow you the ability to have two-way text messaging with Sales2Scale. You are able to message your customers directly from inside the desktop version or the Sales2Scale mobile app. You can request payments via text and utilize prebuilt SMS templates. You can even record a short video and send it from inside the mobile app.

PHONE: You can purchase one phone number and forward it to any number you like. You can also create number pools to track marketing ads or have numbers for individual users.

Sales2Scale allows you to dial from the system and the desktop and Sales2Scale mobile app. Built in is a power dialer that allows you to stack multiple calls and dial each one with just a click. You are also able to record all phone calls so that you can listen to them later.

You can automate many of these features, including voicemail drops to new leads which is where their phone does not ring but you are able to leave a voicemail. Other powerful automations include: missed call text back and call tracking for Google My Business members. Calls can be routed many different ways to suit your company's needs.

EMAIL: It is one thing to offer an email builder, but it's another to give it a nice UI and make it fast. The simple-to-use drag and drop builder has all the features you need as a marketing company that is building custom emails for your clients.

Sales2Scale offers the ability to import any HTML emails that you may already have, as well as other features like embedding video content into your emails. You can access these templates throughout the system in places like the workflow builder, bulk actions and inside the contact detail itself.

CENTRALIZED COMMUNICATION: Pick up the conversation seamlessly right inside the contact record with centralized communication. This brings all forms of communication into one spot. Currently, from inside of Sales2Scale, you can communicate with your customers via email, phone, SMS, Facebook Messenger, Google My Business Messaging and Instagram DM.

APPOINTMENT SETTING: Replace softwares like Calendly and automate and manage multiple team calendars in Sales2Scale. You have complete control over each calendar's availability in which users are assigned, the ability to round-robin leads to those users, take payment prior to booking an appointment and multiple options when it comes to integrating forms with your appointment calendar.

It is easy to automate reminder campaigns that include links to reschedule and cancel but you also have the ability to manually or automatically confirm appointments. You or your team can also manually enter appointments via the individual contact record, mobile app or scheduling calendar in Sales2Scale.

Users are able to integrate their Google calendar so that they are never double-booked. They can see all their appointments in the designated Google calendar or in the Sales2Scale mobile app.

GOOGLE MY BUSINESS MESSAGING: Sales2Scale now allows customers to message you right from your Google My Business page and those messages will come directly into your Sales2Scale CRM. You are able to build automations off of this channel and respond easily via the desktop or Sales2Scale mobile app.

FACEBOOK MESSENGER: Sales2Scale has integrated with Facebook Messenger. All conversations that come in through FB get routed right into and tracked in your Sales2Scale CRM. Normally due to Facebook restrictions you have a 24 hour window to communicate with your new lead but Sales2Scale, in partnership with Facebook and their newhuman API that is in beta, allows us to extend that window to 7 days (for manual responses).

NOTES: Create notes inside specific contact details. You are also able to automate additional notes via the workflow builder.

TASKS: Add tasks manually or through automation for specific users with due dates. You can build reminder automations for these tasks as well.

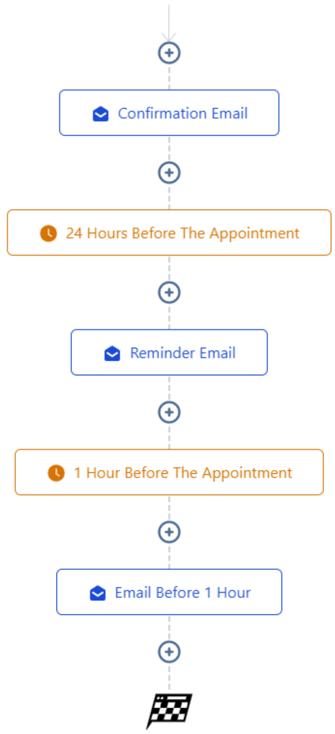
ATTRIBUTION TRACKING: Inside each contact you can see the client's journey. The activity record shows what pages they have visited, forms they have submitted, etc. In addition, Sales2Scale tracks the first attribution source as well as the latest attribution source so you know how the contact found you initially and also recently.

TEXT 2 PAY: Make receiving payments even easier with text 2 pay via Stripe. Select items, price per item and invoice number. You are able to set a custom date for the request to expire. The customer will be given a link that takes them to a Stripe invoice featuring your logo, and will have the ability to download a PDF and pay via credit, debit card or Apple Pay.

CUSTOM FIELD ACCESS: Access custom fields for each user inside their contact details. These can be used in forms and surveys to help you further sift and sort your audience via filters in the Sales2Scale CRM. Also, as a reference, when speaking with the customer.

More advanced users often use these to trigger and filter automations and do other cool ninja things.

INSTAGRAM DM: Sales2Scale is now integrated with Instagram DM as a new communication channel allowing you two-way communication with new leads inside of Sales2Scale and the Sales2Scale mobile app.



Workflow Builder

I am loving this new feature! It came out just at the end of Spring, here in 2021 and basically takes the place of both the campaign and trigger sections of the software as it combines the two together. It makes for a fun and creative experience in building out your automations. Choose any number of sequences and fire off triggers to send alerts, texts, phone calls – any imaginable journey you could come up with using the various functions provided – see below for more details on this.

- Automation Overview
- External Communications
- CRM Automation
- Conditions
- Visibility

AUTOMATION OVERVIEW: Workflows is a powerful tool to help automate many different types of actions in the system. You can trigger off many things. Common trigger options are: forms submitted, contact changed, customer booked appointment;

just to name a few. You can also manually add contacts or groups of contacts to workflows.

Workflows can be as simple as “add tag trigger” or as complex as you’d like.

EXTERNAL COMMUNICATIONS:

External communications include:

• Send email • Send sms • Call • Voicemail	• FB messenger • Manual sms • Manual call • GMB messaging

The call step will forward the call to the assigned user or company phone with a whisper message allowing the user to take the new lead call or send it to voicemail.

Both the manual call and the manual sms will cue up the leads to be called back at a designated time in bulk.

You are able to use custom templates, as well as multiple custom values and trigger links in these external communications. This opens up another world of possibilities for tracking as well as the ability to update common company information throughout all workflows in one place.

CRM AUTOMATIONS: These are internal actions that allow you to do such things as send internal notifications, add tags and send review requests. Here is a full list of what all you can do:

• Add contact tag • Remove contact tag • Add/Update opportunity • Add to notes • Assign to user • Remove assigned user • Add to workflow • Remove from workflow • Remove from all workflows • Remove opportunity • Send internal notifications • Set contact dnd	• Edit conversation • Send review request • Stripe one-time charge • Update appointment status • Add task • Add to google analytics • Add to google ad words • Update contact field • Facebook – add to custom audience • Facebook – remove from custom audience • Facebook – conversion API • Membership grant offer • Membership revoke offer

CONDITIONS: Currently consisting of three main conditions (and more to come) these conditions allow for more dynamic workflows to be created. You are able to add multiple segments and conditions and utilize “and/or” between segments.

IF/ELSE – This powerful condition can fork the context journey based on many specific segments.

- Contact Details (i.e. email, address, zip code, tags, custom fields)
- Contact Actions (i.e. contact replied, content type, replied message)
- Date/Time

- Workflow Trigger: is/is not

WAIT STEP – This holds the contact for a specific time until a condition exists, or until the contact replies.

- Time (time can hold a contact for a set period of time)
- Condition (condition examples: until they have a tag)
- Appointment time (appointment example is before after appt time or event start date)
- Contact reply (it waits until a reply)

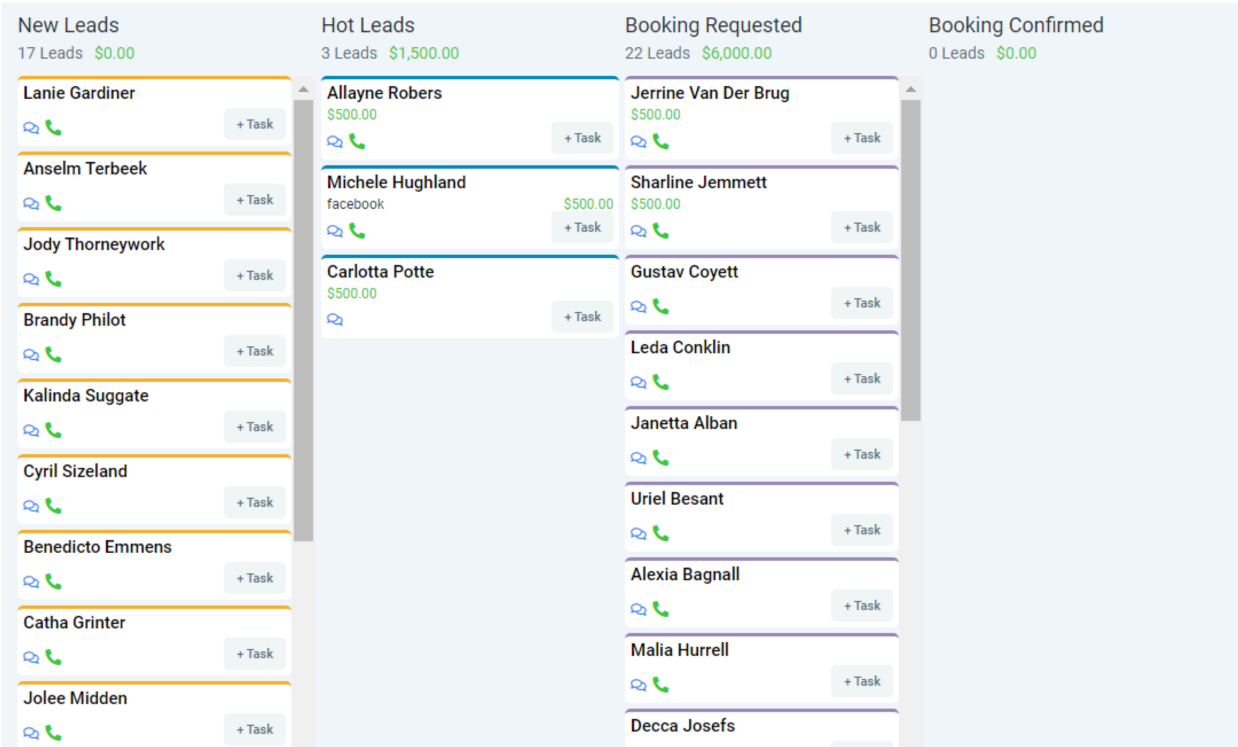
WEBHOOK – Fires a webhook containing a contact's details.

VISIBILITY: In workflows you have access to detailed statistics, status and action logs to help you troubleshoot and see how leads are moving through the workflow. Detailed email statistics are available, including delivered, opened, clicked, replied, bounced and unsubscribed.

Opportunity Pipeline

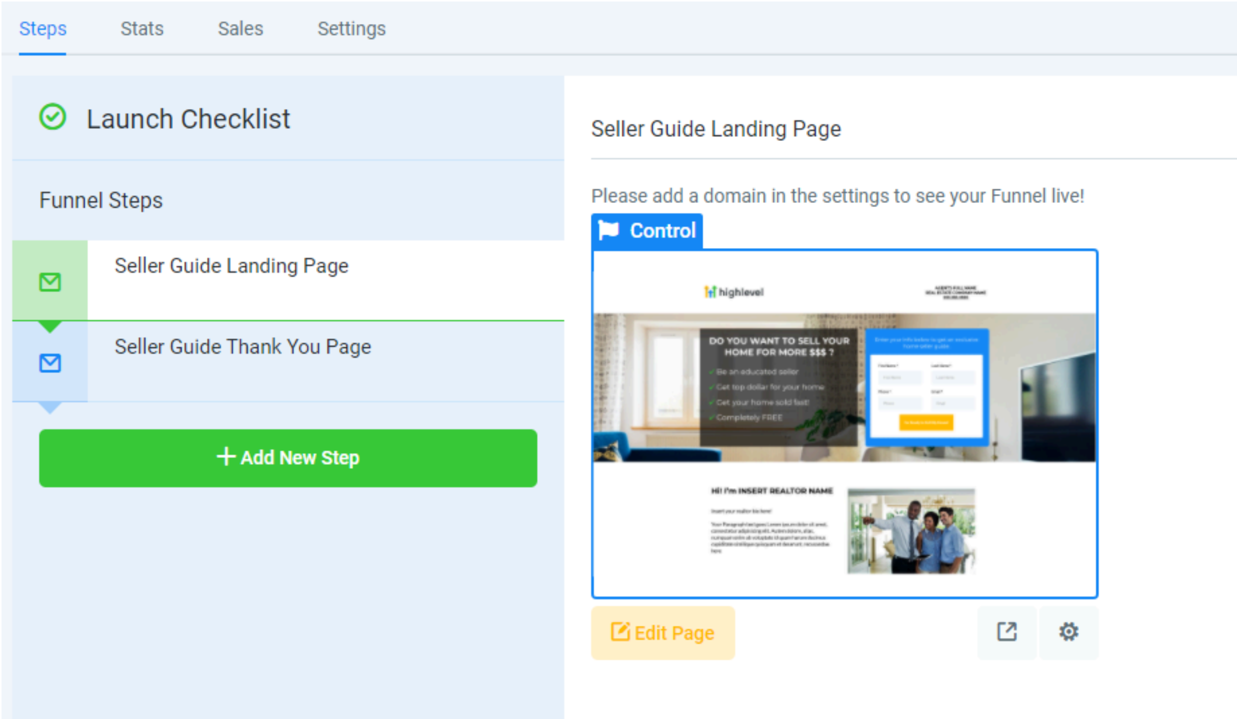
An opportunity pipeline is an absolute must in sales; it is a real-time view of an organization's current sales activities.
The nice thing about the Sales2Scale pipeline is that you can customize it with such minute detail if needed to map out your own company's flow of leads from start to finish.

Read on for more about this feature.



PIPELINE OVERVIEW: Sales2Scale allows you to have multiple sales pipelines and configure them to your specific operational needs. The most common way of utilizing pipelines is to track a lead's journey through your sales process. You can also create additional pipelines for internal operational pipelines to help your team stay organized. In the Sales2Scale opportunities pipeline you are able to automate the lead moving through the process via workflow automations or you can do so manually with the drag and drop feature, moving them from step to step, or do a little of both.
You can filter what you see by time/date, pipeline name, user and workflow. You can also filter by open, won, lost or abandoned.

Your opportunities will show up on your dashboard reports and reveal things like sales conversion and lead value.



Funnel Builder

We can't talk about automation and follow-up lead nurture campaigns without mentioning being able to create the marketing funnel to get leads into your nurture. Sales2Scale allows you to bundle the websites, landing pages, forms and surveys you have built and create sequences that take the lead through the necessary steps to convert them into a prospect.

Utilize low friction features like sticky contact info, incorporate your Facebook pixel, embed booking calendars and 2-step order forms.

FUNNEL BUILDER FEATURES: Similar to ClickFunnels, Sales2Scale offers a full-featured funnel builder that allows you to create web pages that are structured in a series of specific steps with a specific outcome in mind. In addition, you can easily import existing ClickFunnels.

This is a drag and drop builder that allows you to customize for mobile, add custom code, pop ups, two-step order forms and calendars. You can add other elements like a countdown timer, progress bar, maps, reviews, surveys and more.

Includes SEO meta data features and site maps to help with making your funnels SEO friendly.

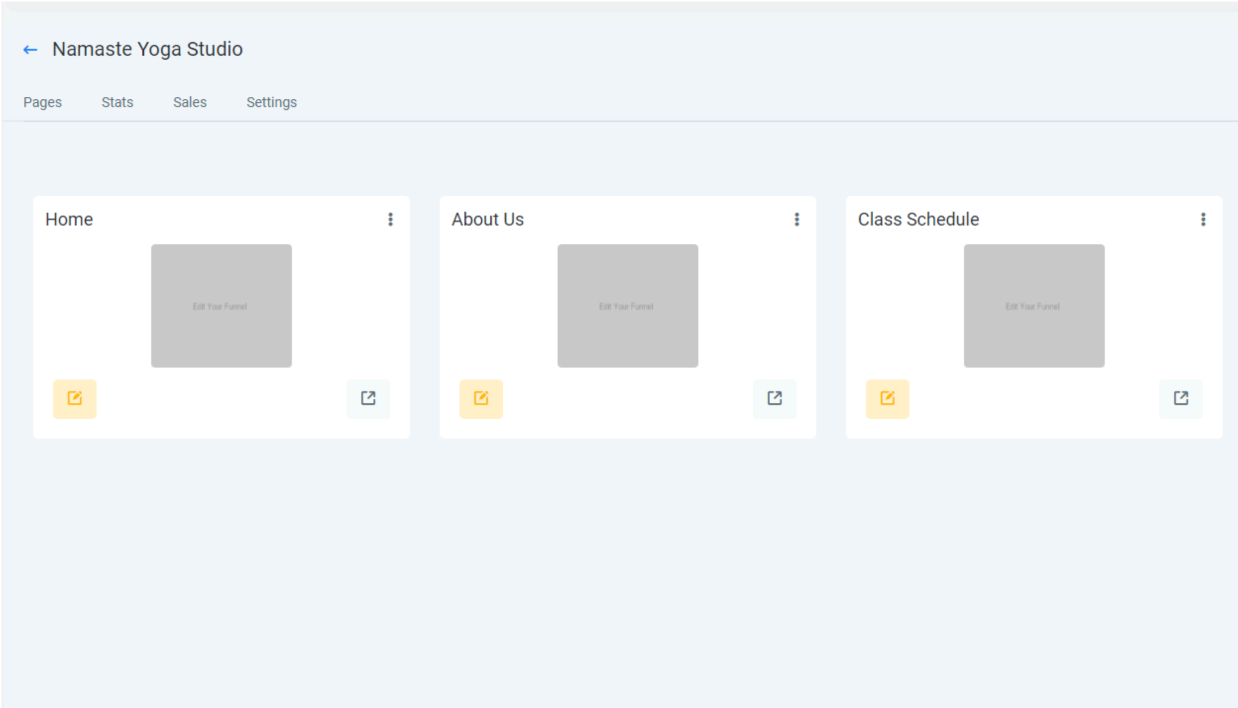
Includes statistics such as page views, opt-ins, sales and earnings/page view.

In the Sales2Scale funnel builder you can integrate payments for subscriptions, one time payments as well as payment plans. You can set trial periods, enable up front costs, bump products and assign to membership offers.

Website & Landing Page Builder

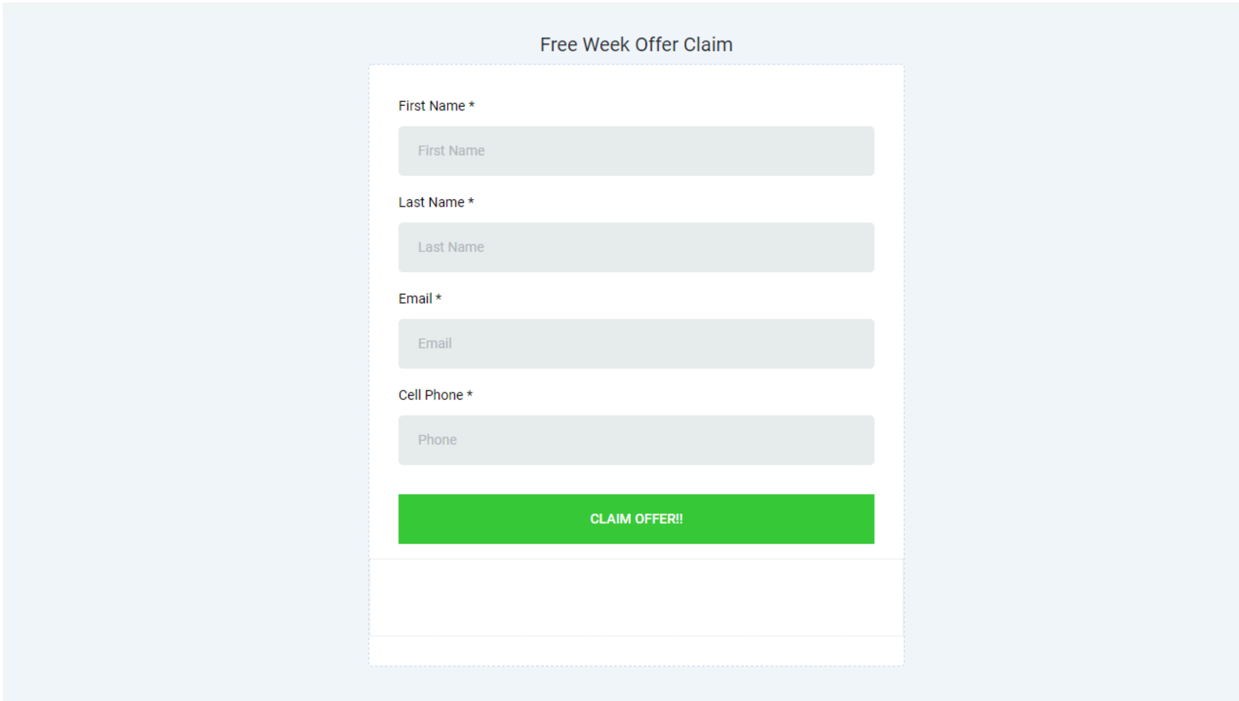
I love that you can build beautiful landing pages and websites right in Sales2Scale and then easily integrate them into your sales funnel as well as duplicate them for new clients in the same niche.

Sales2Scale offers the ability to pull up an existing free template and modify it, or build a website from scratch has never been easier. You can even have Sales2Scale help migrate a site for you, or build a custom site for your client as well.



FEATURES OF THE WEBSITE BUILDER: Create full-featured multi-page websites inside of Sales2Scale. The platform offers solid page load speeds, SEO features you come to expect like site map and metadata, and a drag-and-drop interface that is intuitive and mobile-friendly.

Like the funnel builder, you can add custom CSS and HTML code as well as embed many native features like forms, surveys, calendars, two-step order forms and pop-up windows.



Forms & Survey Builder

Create forms that you can embed on websites with an iframe code or that can easily be integrated into websites or landing pages that you have built in Sales2Scale Customize your form's layout, use custom fields, custom CSS, all the features you want in a form to capture the lead info you need for your nurture campaign.

Take leads through an experience that allows you to capture important details to aid you in qualifying them. Use conditional logic to further customize their experience and drive conversion.

- Builder
- Analytics and Submissions
- Surveys

BUILDER: As expected you have access to all common fields such as name address phone email and more, but where Sales2Scale becomes powerful is in the ability to create custom fields:

• Text • Large text • Phone • Numerical • Monetary • Check box • Single option	• Multiple options • Radio button • Date • Text box list • File upload • Signature

In the builder you can add a Facebook pixel ID, link to a specific URL and submission, turn on or off ‘sticky contact’ and add custom CSS. You can embed forms via iFrame or utilize a link.

ANALYTICS AND SUBMISSIONS: See your form submissions with detailed analytics. You compare submissions between different forms and view individual contact submissions, as well as be able to download all of that into a PDF, if desired.

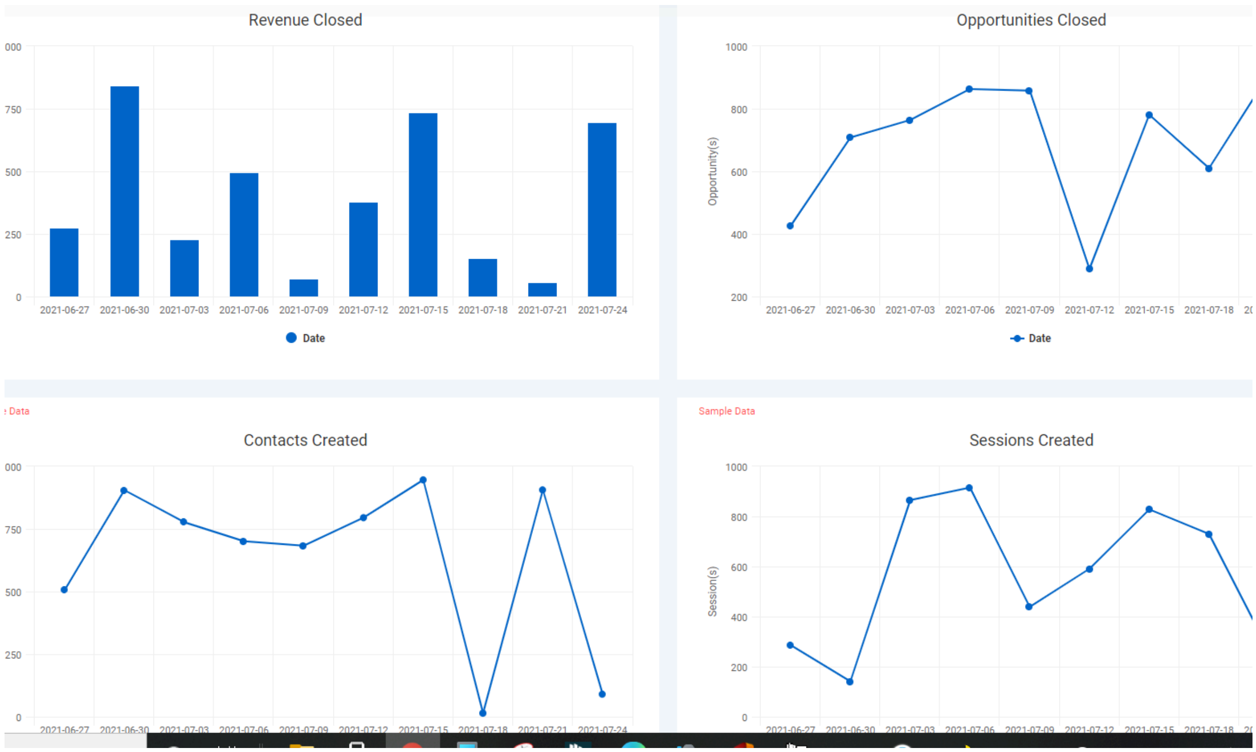
All form submissions show up in the Sales2Scale CRM contact record under additional info. The nice part about Sales2Scale is that you can trigger off of these specific custom fields and build extensive automations based on their data.

SURVEYS: Surveys have all the same features as the form builder but take the lead on a journey of qualifying questions and utilize conditional logic. This allows you to customize the questions being asked based on the previous answer. It also allows you to disqualify leads that do not meet specific criteria.

Reporting & Attribution

Enjoy true Ad to Customer Attribution with Sales2Scale®. Every business needs to know how each specific ad performs and converts. Bringing so many softwares into one, combined with thoughtful integrations has allowed marketers to easily track their ad dollars clear to the end where a lead becomes a customer or is lost.

See valuable graphic representations of performance as well as detailed source reporting. It's clean, robust and beyond useful when speaking to a client, and making important marketing decisions.



- Google Ads
- Facebook Ads
- Attribution Report
- Call Reporting
- Appointment Reporting

GOOGLE ADS: See all of your PPC data including ad groups, ads, keywords, conversion data and things like clicks, impressions, cost, average, CPC, device, etc. See which ads are not just converting but leading to actual sales.

FACEBOOK ADS: View detailed information about campaigns, ad sets, ads, and demographics.

ATTRIBUTION REPORT: In attribution reporting you can see where all of your traffic is coming from, broken out by organic search, direct traffic, referral and social media. See how many opportunities have been closed per contact in the conversion report. See detailed source information in the source report, including UTM parameters. You can also customize columns and filter and export the data that you need.

CALL REPORTING: View answered versus missed calls, call sources and average call time. You have access to detailed filters which give you full visibility on incoming and outgoing calls.

If you have call recording turned on you have access to all recorded calls. You also have the ability to download the call recordings.

APPOINTMENT REPORTING: See critical information about how appointments are booked, who created them, who was assigned, how they are channeled, where they came in from and what their outcomes are, all in one place. See how many confirmed, canceled, showed and no showed all in one dashboard. You can filter by calendar and by date. Filter by anything you like, actually. Examples are: confirmed, new, canceled, etc.

Reputation Management

What business doesn't want lots of 5-star reviews? We give this away as a bonus to our clients and they love it. The inbuilt reputation management is easy to set up and use. The reputation management tool allows you to request reviews from your customers, quickly respond to all Google & Facebook reviews, and easily display reviews on your website or funnels.

FEATURE FUNCTIONS: Sales2Scale offers a full reputation management tool that allows you to do everything you need to do for and with your Google My Business and Facebook reviews. Not only can you automate review requests, you can manually send them, reply to reviews, and even report the reviews you feel are suspect. See an overview of your review ratings per platform, view trends and see the latest reviews all within the Sales2Scale reputation dashboard.

Membership & Course Builder

Now you can build out free or paid training for HR dept., new hire training, video courses, free mini-course lead magnets, all within Sales2Scale. Even included in your snapshot so that you can copy across to other Sales2Scale locations within your unlimited license.

FEATURES: Organize your video course and incorporate that into an automated campaign, or have as a training for client's branding needs, etc. In this virtual world we are living in, this can be a powerful tool.