

# FleetLeads

## SYSTEM SCOPE AND DELIVERABLES

Executives interested in reviewing the scope and deliverables of a FleetLeads system for their company are invited to schedule a half-day meeting at our office in Toledo, Ohio. Optionally, we can present the FleetLeads system via web conferencing.

If there is continuing interest, the next step would be to discuss system requirements during a teleconference. This document will serve as the discussion guide. The scope of any FleetLeads implementation will vary according to client specific objectives. The table below provides three typical configuration options.<sup>1</sup>

Activity	Lead Distribution	Prospecting	Market Opp'ty
1. System customizations and maintenance	✓	✓	✓
2. Select and import leads	✓	✓	✓
3. Import client prospect files		✓	✓
4. Import customer file			✓
5. Import Havill industry research market data			✓
6. Geocode prospects to locations		✓	✓
7. Geocode customers to locations			✓
8. Develop and apply market scores		✓	✓
9. Manage opportunities and user-defined fields		✓	✓
10. Administrator training and support	✓	✓	✓
11. Lead distribution support	✓	✓	✓
12. Campaign management and sales support		✓	✓
13. Sales productivity analysis support		✓	✓
14. Market opportunity management support			✓

- SYSTEM CUSTOMIZATIONS AND MAINTENANCE** – Your own private database is created on our FleetLeads server. The system carries your company logo and can only be accessible via authorized user names and passwords. System maintenance and upgrades are provided throughout the year.
- SELECT AND IMPORT LEADS** – A prospect database of 730,000 fleet operators is available through FleetLeads. Submit your geographic criteria and the corresponding records will be imported into your FleetLeads system.
- IMPORT CLIENT PROSPECT FILES** – Importing existing prospect files into FleetLeads makes them available to all system users. This feature is commonly used to provide leads to the field following a direct mail or telemarketing campaign.
- IMPORT CUSTOMER FILE** – Importing customer records into FleetLeads enables marketers to manage customer service and loyalty programs. Monthly data feeds of customer data keep customer and prospect status current and enable accurate market penetration reporting.

<sup>1</sup> Clients are free to add program features at any time. Clients can cancel their FleetLeads service with 90 days written notice.

5. **IMPORT HAVILL INDUSTRY RESEARCH MARKET DATA** – Access to Havill & Company’s industry market information makes it possible to measure market opportunity and track penetration. Through the compilation of various data sources including research from our national fleet surveys, we are able to provide the ability to generate opportunity reports based on the universe of commercial fleet operators in the US. If you have imported your customer file, you will be able to generate market penetration statistics by comparing the number of your customers to the overall market.
6. **GEOCODE PROSPECTS TO LOCATIONS** – By importing your location directory into FleetLeads and then geocoding prospects to their nearest location, you are able to select prospect records by radius around your distribution points or retail outlets. Direct marketing and personal selling activities can then be organized and implemented based upon location.
7. **GEOCODE CUSTOMERS TO LOCATIONS** – By importing your location directory into FleetLeads and then geocoding customers to their nearest location, you are able to select customer records by radius around your distribution points or retail outlets. Market opportunity and penetration reports can now be generated by location. Assigning customers to locations in this manner will also enable location-based customer retention programs.
8. **DEVELOP AND APPLY MARKET SCORES** – Market scoring your prospect list significantly improves your ability to target the most attractive fleets in your market. Havill & Company develops a market score model by correlating revenue with fleet characteristics found in your customer file. Applying this model to the FleetLeads database of prospects enables you to target prospects that resemble high potential customers.
9. **MANAGING OPPORTUNITIES AND USER-DEFINED FIELDS** – Using the customized opportunity manager and user-defined fields, you are able to more effectively manage your prospecting and customer retention activities. The opportunity manager enables you to track specific product and service opportunities for each prospect and customer in your system. This feature can also be used to track cross-selling opportunities. User-defined fields can be configured to track any demographic or business related information. Examples include: number and type of vehicles, number of employees, credit limit, age of business, pricing category, etc.
10. **ADMINISTRATOR TRAINING AND SUPPORT** – Your administrator will work closely with one of our FleetLeads account managers to further configure and maintain your FleetLeads system. An administrator logon account will be activated. Administrator training will cover all of the features built into your FleetLeads system.
11. **LEAD DISTRIBUTION SUPPORT** – For lead distribution, support is provided for the Criteria Center, the Roster, and Download Data functions. The Criteria Center is used to segment prospects based on a variety of geographic and business demographic criteria. The roster enables users to view leads, and print lead lists and detailed lead profiles. The download function permits users to download criteria sets of prospects to be imported into any database management application.
12. **CAMPAIGN MANAGEMENT AND SALES SUPPORT** – For campaign management and sales execution, support is provided for the Contact Page that includes scheduled activities, history, notes, user-defined fields, and opportunities. The Scripts, sales process macros, and Merge Center functions are also supported. Your FleetLeads account manager will provide guidance on creating and executing direct marketing and sales support campaigns.

13. **SALES PRODUCTIVITY ANALYSIS SUPPORT** – For sales productivity analysis, support is provided for available market, sales pipeline, and sales and marketing follow-up reporting. These reports track the productivity of sales activities by organization, rep, territory, location, and business and fleet characteristics.
14. **MARKET OPPORTUNITY MANAGEMENT SUPPORT** – For market opportunity management, support is provided for market opportunity and penetration reporting functions. In conjunction with the Criteria Center, these reports are used to identify the most attractive fleet segments for new marketing campaigns. These reports also track the effectiveness of marketing and sales activities by organization, rep, territory, location, and business and fleet characteristics.