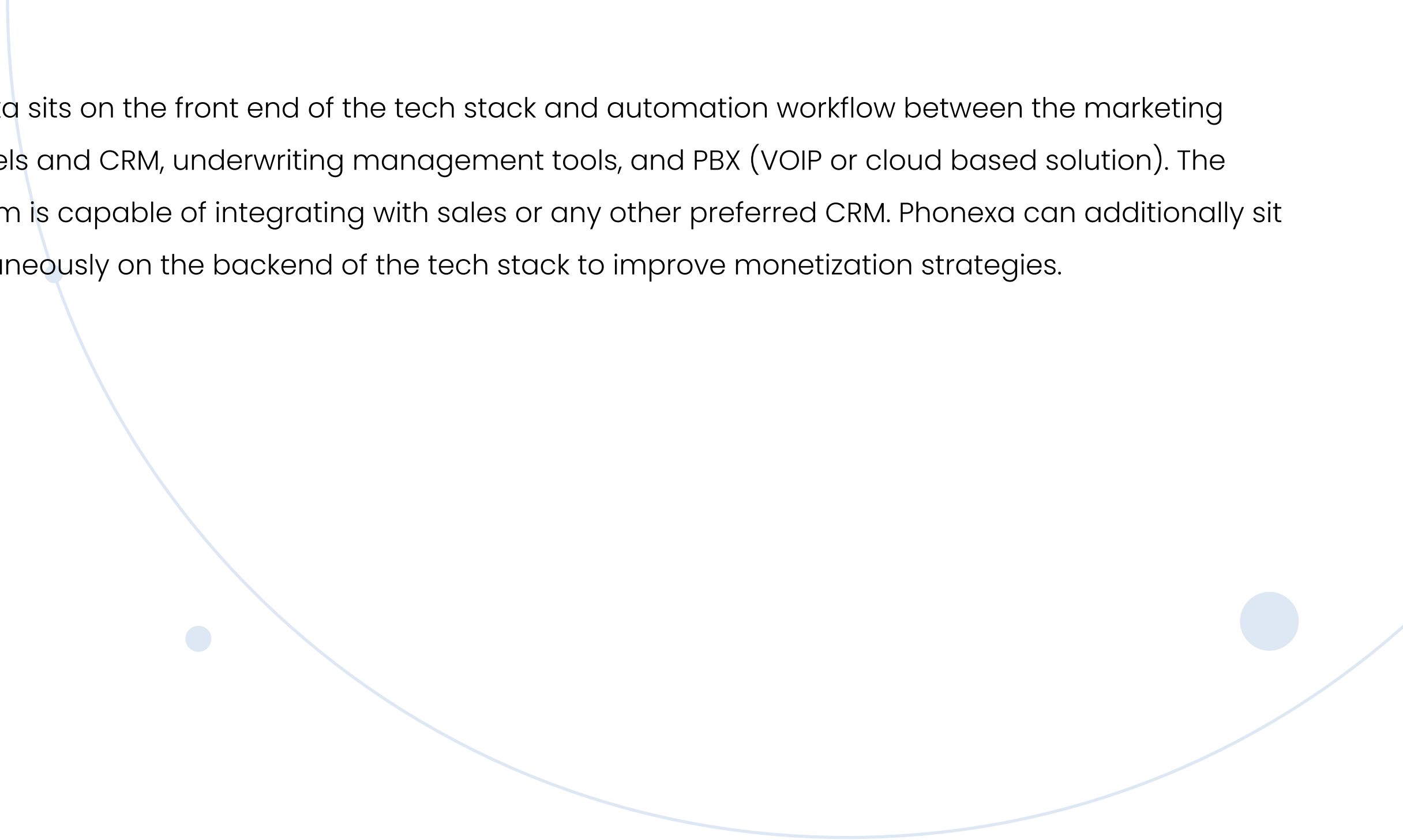




**Phonexa<sup>®</sup>**

## Where Phonexa Sits Within The Customer Tech Stack

Phonexa sits on the front end of the tech stack and automation workflow between the marketing channels and CRM, underwriting management tools, and PBX (VOIP or cloud based solution). The platform is capable of integrating with sales or any other preferred CRM. Phonexa can additionally sit simultaneously on the backend of the tech stack to improve monetization strategies.





## Marketing Planning



- Build complex multi-channel journeys (Call, click, form, email, SMS).
- Discover untapped opportunities and refine strategies in real-time through powerful reporting and analytics.

## Attract



- Improve PPC bidding strategies with conversion data post-backs.
- Enhance routing of call traffic with Dynamic Number Insertion.
- Gain end-to-end omnichannel ROAS transparency (Return on Ad Spend) with robust reporting.

## Convert



- Increase conversions by pre-populating forms with third-party data in real-time.
- Reduce fraud with lead validation and verification.
- Gain CRO (Conversion Rate Optimization) insights.

## Nurture



- Market across multiple ESPs and SMS providers within one platform.
- Increase engagement with multi-channel campaigns (SMS + email).
- Optimize campaigns based on channel, IP quality, domain, and vendor KPIs.

## Sales/Close

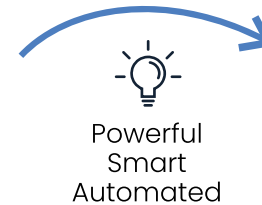


- Eliminate CRM lead duplication and improve attribution accuracy.
- See the full customer journey and close the marketing-sales gap with Ping-Back dispositions.
- Identify which marketing channels create the highest quality sales engagements in real-time.

## Analytics & Automation



- Post data into any open API platform.
- Eliminate trial & error with predictive analytics (Waves).
- Gain customer specific insights with customized datasets and scoring.



## MARKETING CHANNELS

**Call Leads   Web Leads   Social Media Leads   Email   SMS   Clicks**



# Phonexa's Omnichannel Value Proposition



## SOLUTION

## COMPETITOR



Call Logic

Call tracking and distribution

Invoca



LMS Sync

Lead tracking and distribution

Cake



E-Delivery

Email and SMS marketing

Ongage



Cloud PBX

Cloud phone system

Avaya



Lynx

Click tracking

Tune / HasOffers



Opt-Intel

Suppression list management

Optizmo



Books360

Automated accounting

QuickBooks

# Analytical & Integration Capabilities Are At The Core Of Phonexa's Value Proposition

Each of Phonexa's integrations are unique to each client's business model, and analytics are refined to specific verticals, and each business use case.

Phonexa has created custom integration build outs with the following integration partners:

**Jornaya:** Custom lead scoring API

**Active Prospect (trusted form):** Lead compliance validation API

**Data Lab:** Lead append API

**Equifax:** Lead append API; collect additional consumer data

**EKATA:** Lead validation append API; database look-up for lead validation and data append

**Contact Compliance Center:** Lead validation API, compliance lookup

**The Blacklist Alliance:** Lead validation API; compliance lookup

**TCPA Litigator List:** Lead validation API; compliance lookup

**Stripe:** Payment processing solutions

**PayPal:** Payment processing solutions

**Authorize.Net:** Payment processing solutions

# The Impact Of Phonexa On Customers' Businesses After Implementation

Phonexa's features increase sales conversions, enable customer success, diversify and strengthen data security and protocol standards, and more.

## Security & Compliance

## Fraud Detection & Data Verification

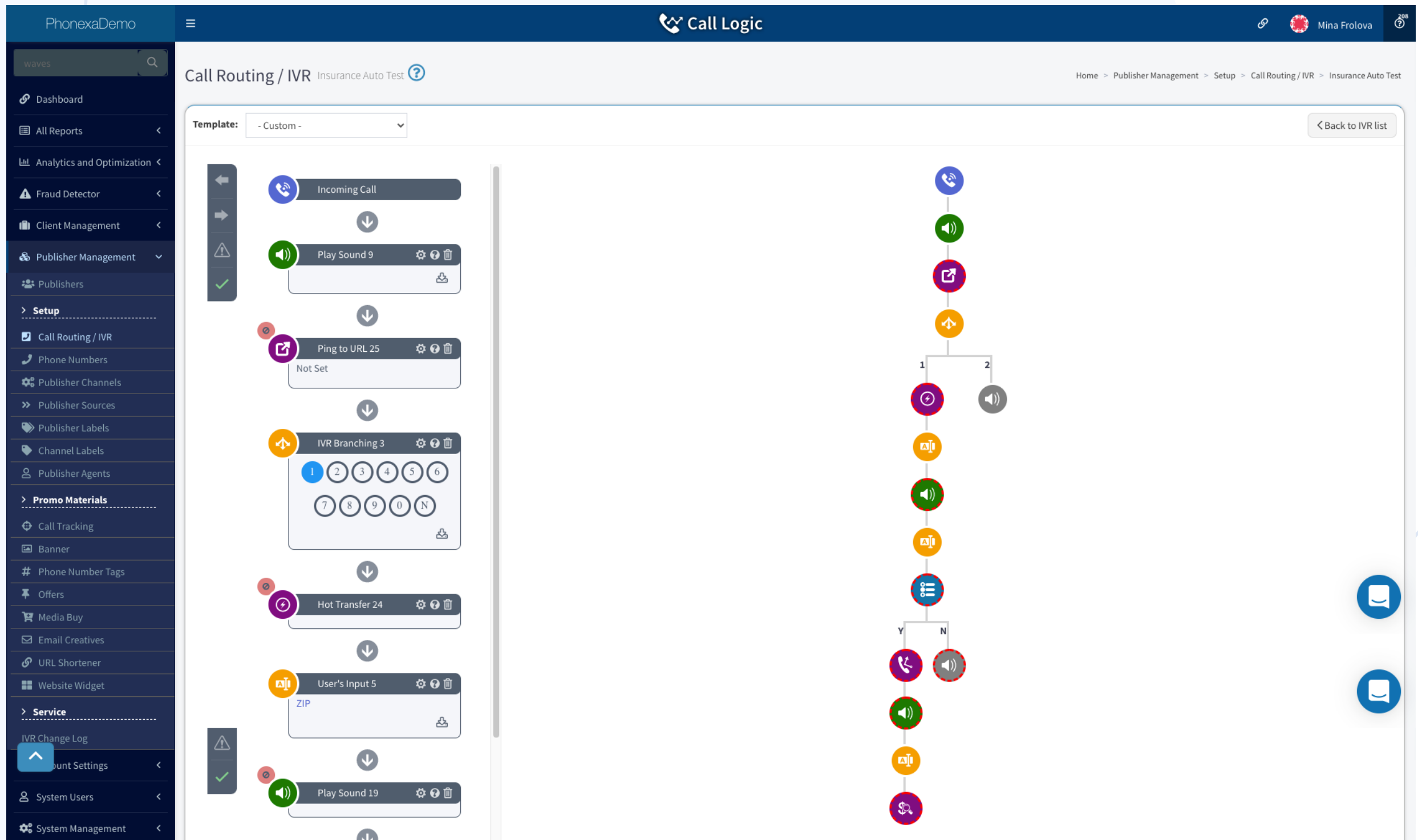
## SOC 2 Type 2 Compliant

## Free API & Third-Party Integrations

- Buy, sell, or distribute leads more profitably with end-to-end automation
- Save time, save money, and buy leads in real time with diversified consumer journeys
- 24/7 customer care with assigned representatives and white-glove onboarding
- Fraud detection, compliance, and litigation mitigation
- Singular global dashboard and interface to review financials and reports
  - Optimize buying model to reflect analytics and improve lead flows
  - Streamline processes and enable profitability through central hub
  - Tap in to mobile access with iOS and Android apps

Leverage third-party fraud verification, lead validation, and data append database lookups to increase lead quality and create decisioning logic of where that lead should be delivered based on each data set.

## IVR with Validation & Data Append



A/B test multiple IVRs to hone in on optimizing a high-converting IVR so that every consumer journey converts.

## IVR Performance Summary

PhonexaDemo

Menu search...

Dashboard

All Reports

Publisher Reports

Performance Summary

Call Summary

Call Details

Consent Summary

Consent Details

IVR Performance Summary

Search Call

Banner

Call Errors

Call Errors Summary

Referral Report

TCPA Rejected Calls

TCPA Summary

Phone Number Usage

Buyer Reports

Performance Summary

Call Summary

Call Details

Lead Return/Adjustment

Call Errors

Call Errors Summary

Logs

Contact Us Log

System Activity

System Subscription

Tracking Url

Change Logs

Campaign Change Details

Call Logic

Mina Frolova

208

IVR Performance Report Group by IVR

Home > All Reports > Publisher Reports > IVR Performance Report - Group by

Group by IVR Group By Publisher Group By Phone Number Do not Group

Date 02/14/2022 - 02/14/2022 Product [36] Insurance Auto (Pho... IVR All Publisher All Publisher Phone Number Select an Option Publisher Source Select an Option Call status All

Search Clear all

Showing 1 of 1 entries

Filter: Export to CSV 11 selected

IVR	Call Count	Leads	Sold	Reject	Lead Hangup (IVR)	IVR Errors	IVR Success	Lead Hangup(IVR) Rate %	IVR Error rate %	IVR Success rate %
[258] TraGenIVR	89	89	60	29	0	0	89	0%	0%	100%
Totals	89	89	60	29	0	0	89	0%	0%	100%

Showing 1 of 1 entries

Leverage reporting to identify potential TCPA compliance issues in real-time.

## TCPA Summary Report

PhonexaDemo

Menu search...

Dashboard

All Reports

Publisher Reports

Performance Summary

Call Summary

Call Details

Consent Summary

Consent Details

IVR Performance Summary

Search Call

Banner

Call Errors

Call Errors Summary

Referral Report

TCPA Rejected Calls

TCPA Summary

Phone Number Usage

Buyer Reports

Performance Summary

Call Summary

Call Details

Lead Return/Adjustment

Call Errors

Call Errors Summary

Logs

Contact Us Log

System Activity

System Subscription

Tracking Url

Change Logs

Campaign Change Details

Call Logic

Mina Frolova

208

TCPA Summary Report

Home > All Reports > Publisher Reports > TCPA Summary > Group by D

Group by Publisher

Group by Date

Group by Phone Number

Do not Group

Group by Product

Date

02/07/2022 - 02/11/2022

Product

[15] Insurance Car US (P...

Publisher Agent

All

Publisher

All

Publisher Phone Number

Select an Option

Publisher Source

Select an Option

Phone Number Group

Select an Option

Phone Number Tag

All

Search

Clear all

Showing 5 of 5 entries

Filter:

Export to CSV

9 selected

Date	Call	Lead	TCPA Accepted	TCPA Rejected	TCPA N/A	TCPA Accepted Rate, %	TCPA Rejected Rate, %	TCPA N/A, %
Feb 11	32	32	0	0	32	0%	0%	100%
Feb 10	35	35	0	0	35	0%	0%	100%
Feb 09	21	21	0	0	21	0%	0%	100%
Feb 08	24	24	0	0	24	0%	0%	100%
Feb 07	35	35	0	0	35	0%	0%	100%
Totals	147	147	0	0	147	0%	0%	100%

Showing 5 of 5 entries



Instantly identify what kind of consumer consent was collected for marketing and auditing purposes.

## Consent Report

Testing Inst

Menu search...

Dashboard

All Reports

Publisher Reports

Performance Summary

Call Summary

Call Details

Consent Summary

Consent Details

IVR Performance Summary

Search Call

Banner

Call Errors

Call Errors Summary

Referral Report

TCPA Rejected Calls

TCPA Summary

Phone Number Usage

Buyer Reports

Performance Summary

Call Summary

Call Details

Lead Return/Adjustment

Call Errors

Call Errors Summary

Logs

Contact Us Log

System Activity

System Subscription

Tracking Url

Change Logs

Campaign Change Details

Call Logic

Consent Summary Report

Home > All Reports > Publisher Reports > Consent Summary > Group by Publisher

Group by PublisherGroup by DateGroup by ConsentGroup by IVRGroup by Call status

Date02/01/2022 - 02/14/2022Product[36] Insurance Auto (Pho...Publisher AgentAllPublisherAllPublisher Phone NumberSelect an OptionPublisher SourceSelect an OptionPhone Number TagAll

ConsentAllConsent StatusAllIVRAll

SearchClear all

Showing 4 of 4 entries

Filter:

Export to CSV

9 selected

Publisher	Consent Status	Calls	Leads	Sold	Reject	Consent	Ping to E-Delivery	Consent Payout
[1012] TestPublisher	Yes	1	1	1	0	1	0	\$2.00
[1012] TestPublisher	No	1	1	0	1	1	0	\$0.00
[1019] vaderinc	Yes	1	1	0	1	1	0	\$2.00
[1019] vaderinc	No	2	2	0	2	2	0	\$0.00
Totals						5	0	\$4.00

Showing 4 of 4 entries

Use ping tree technology (unique to the call space) to provide a multi-layered approach to your call distribution strategies, while taking into account monetization and marketing automation strategies with SMS campaigns – price, priority, weight, silent ping tree strategies, and more.

## Ping Tree Strategies

The screenshot displays the 'Call Logic' interface for 'Jesse's Christmas Pingtree'. The left sidebar contains navigation options: Dashboard, All Reports, Analytics and Optimization, Fraud Detector, Client Management, Buyer List, Setup (Campaigns, Campaign Groups, Ping Tree Settings, Ping Tree Distribution, Phone Numbers, Present & Do Not Present Lists, Buyer Agents), Additional settings (Buyer Labels, Buyer Types, Buyer Defined Labels, Campaign Tags, Buyer Tags, Campaign Templates), Publisher Management, Account Settings, System Users, System Management, and Documents And References.

The main content area shows the 'Ping Tree edit' interface for 'Jesse's Christmas Pingtree'. The top bar indicates 'Active Users: 1 minafrolova'. Below this, there are tabs for 'Ping Tree', 'Analytics', 'Ping Tree comparison', and 'Ping Tree diff versions'. The 'Strategy' is set to 'Priority'. The interface is divided into two main sections: 'Ping Tree List' and 'Not In Ping Tree'.

**Ping Tree List:** This section shows two active strategies. The first is '#264: [120] BigMax Auto Leads : [264] AutoIns\_BigMax\_Phoenix' with a value of '\$0.00'. The second is '#263: [120] BigMax Auto Leads : [263] AutoIns\_BigMax\_Dallas' with a value of '\$1.00'. Each entry has buttons for 'To the top', 'To the bottom', 'Remove', and 'Set'.

**Not In Ping Tree:** This section shows several disabled strategies. The first is '#291: [120] BigMax Auto Leads : [291] jason\_test' with a value of '\$5.00'. The second is '#209: [97] TrafGenFor Insurance Auto US : [209] TrafGenInsrAut...' with a value of '\$100.00'. The third is '#208: [97] TrafGenFor Insurance Auto US : [208] TrafGenFor Insur...' with a value of '\$20.00'. The fourth is '#213: [98] TrafGenFor Insurance Auto US2 : [213] TrafGenInsrAut...' with a value of '\$20.00'. The fifth is '#210: [98] TrafGenFor Insurance Auto US2 : [210] TrafGenInsrAut...' with a value of '\$50.00'. Each entry has buttons for 'To the top', 'To the bottom', 'Remove', and 'Set'.

The bottom of the interface includes a 'Save' button and a 'Cancel' button. The footer text reads 'Copyright 2022. All rights reserved.'

Pingback disposition feature provides a transparent overview of each consumer journey to bridge the gap between marketing and sales. Identify lead quality down to a marketing channel level in real-time while simultaneously identifying what marketing channels are creating quality sales engagements that are leading to more products and services sold.

## Buyer Summary Report (Pingback Disposition)

PhonexaDemo

Menu search...

Dashboard
All Reports
Analytics and Optimization
Fraud Detector
Client Management
Buyer List
Setup
Campaigns
Campaign Groups
Ping Tree Settings
Ping Tree Distribution
Phone Numbers
Present & Do Not Present Lists
Buyer Agents
Additional settings
Buyer Labels
Buyer Types
Buyer Defined Labels
Campaign Tags
Buyer Tags
Campaign Templates
Publisher Management
Account Settings
System Users
System Management
Documents And References
Support
Media

Call Logic
Mina Frolova
208

Partner disposition setting API Doc
Home > Client Management > Buyer List > SuperBu

Product
Buyer

[36] Insurance Auto (Ph...
[65] SuperBuyer

Search

Get as PDF

### 1. Partner Disposition Setting Leads Specs

Field Name	Required	Description	Format	Example
apild	YES	Your API Id. Please contact us for details.	E427EF2EA07211EAB83F42010A5C50F2	
apiKey	YES	Your authentication Key. Please contact us for details.	bcbb5054af8d8bd719719e71d55	
leadId <sup>1</sup>	YES	Lead ID	String	W_VVLJ42
cellPhone <sup>1</sup>	YES	CellPhone	String	2123123123
buyerDisposition <sup>2</sup>	YES	Disposition status for the Lead	One of the following: [Converted, Bad Contact, Never Applied, Withdrawn, Pending]	Converted
buyerComment <sup>2</sup>	YES	Buyer's comment	String	Test
productId	YES	Product Id (use this parameter to speed up the search)	Integer	123
campaignId	YES	Campaign Id (use this parameter to speed up the search)	Integer	123
date	NO	Date of sale If no date is specified, data is selected for the last month If the date with time data is selected +/- 2 hours If the date without time, the data is selected for the specified day (use this parameter to speed up the search)	String (Date in format 'Y-m-d\TH:i' or 'Y-m-d')	2019-08-30T1:25
timeZone	NO	Your timezone If no timezone is specified, timezone is selected set by default of instance (use this parameter to speed up the search)	String (Date in format 'Y-m-d\TH:i' or 'Y-m-d')	2019-08-30T1:25

<sup>1,2</sup> - At least one of the parameters must be specified

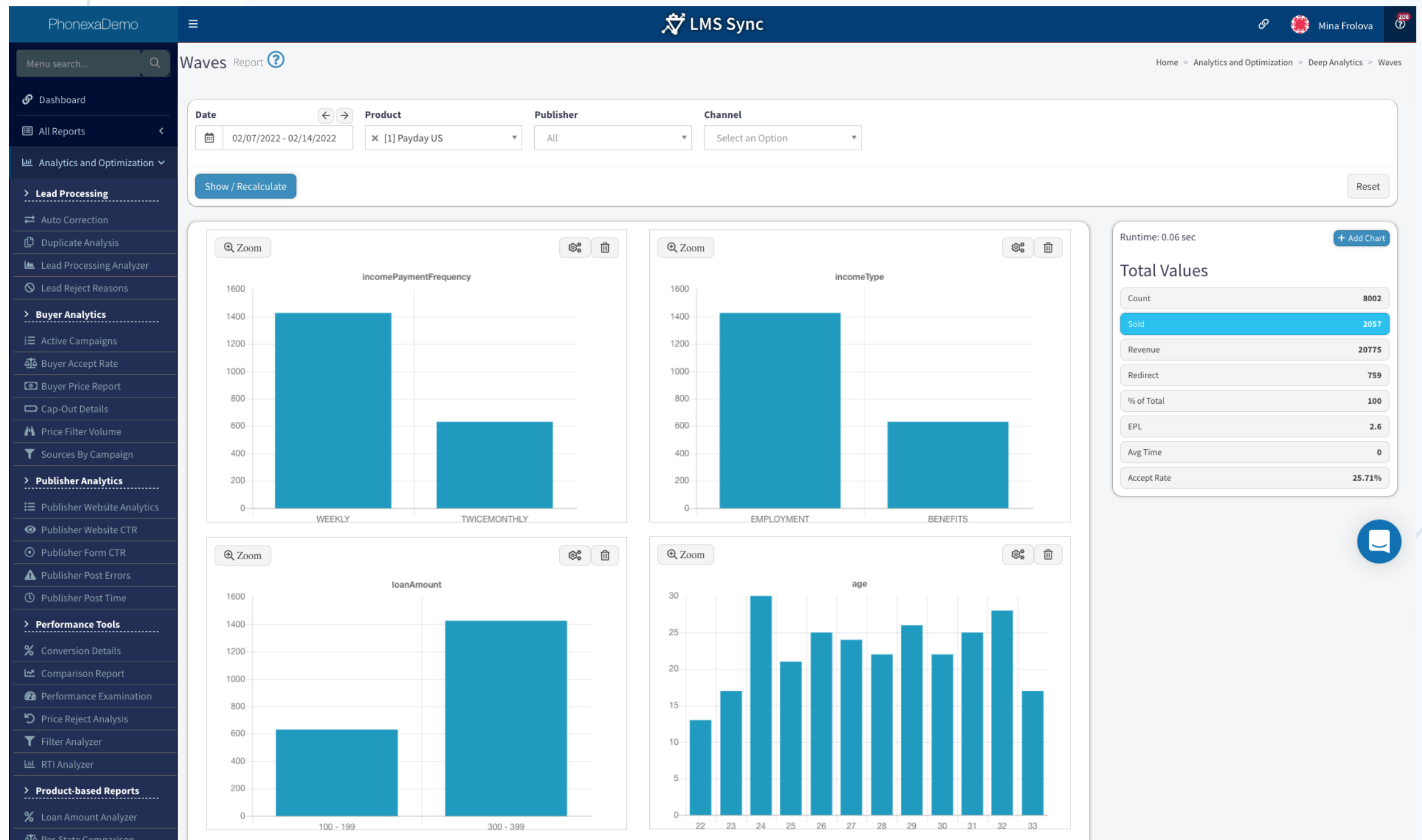
### 2. Sample PHP Code

```
<?php
$mapped = [];
$mapped['apiId'] = ' ';
$mapped['apiKey'] = ' ';
$mapped['leadId'] = ' ';
$mapped['buyerDisposition'] = ' ';
$mapped['productId'] = ' ';

```

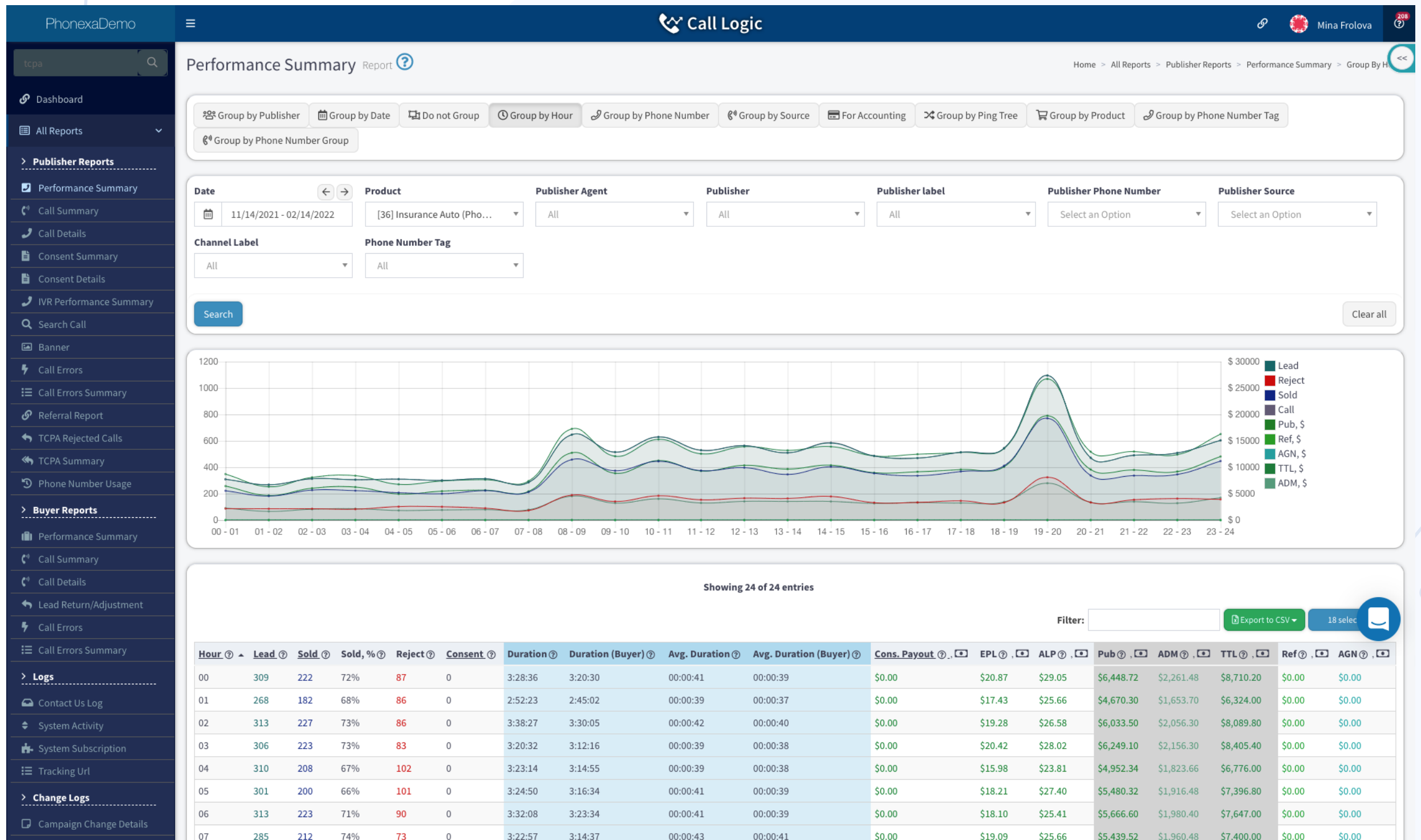
Waves – Phonexa’s proprietary predictive analytics technology – takes the trial and error approach out of marketing decisions by allowing users to interchange various parameters to determine the best avenues for distributing leads. This allows marketing departments to understand the value they’re bringing, and optimize channels to produce the best quality leads for each channel based on historical data.

## Waves



# Additional Reports

## Per Hour Report



# Additional Reports

## Per State Comparison

Analytics and Optimization

Lead Processing

Auto Correction

Duplicate Analysis

Lead Processing Analyzer

Lead Reject Reasons

Buyer Analytics

Active Campaigns

Buyer Accept Rate

Buyer Price Report

Cap-Out Details

Price Filter Volume

Sources By Campaign

Publisher Analytics

Publisher Website Analytics

Publisher Website CTR

Publisher Form CTR

Publisher Post Errors

Publisher Post Time

Performance Tools

Conversion Details

Comparison Report

Performance Examination

Price Reject Analysis

Filter Analyzer

Analyzer

Product-based Reports

Per State Comparison

Per State Comparison Report

Home > Analytics and Optimization > Product-based Reports > Per State Comparison

Date

01/19/2022 - 01/25/2022

Product

[1] Payday US

Publisher

All

State

5 selected

Loan Amount From

Loan Amount To

Search

Clear all

Export to CSV

	Alabama				Alaska				Arizona				Arkansas				California			
Tier	Accept Rate	Posts	Sold	Total Earning	Accept Rate	Posts	Sold	Total Earning	Accept Rate	Posts	Sold	Total Earning	Accept Rate	Posts	Sold	Total Earning	Accept Rate	Posts	Sold	Total Earning
\$890.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	1	0	\$0.00	0%	0	0	\$0.00
\$844.00	0%	1	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00
\$829.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	1	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00
\$805.00	0%	1	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00
\$803.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	1	0	\$0.00	0%	0	0	\$0.00
\$779.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	1	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00
\$770.00	0%	1	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00
\$709.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	1	0	\$0.00	0%	0	0	\$0.00
\$707.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	1	0	\$0.00	0%	0	0	\$0.00
\$702.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	1	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00
\$690.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	1	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00
\$688.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	1	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00
\$646.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	1	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00
\$644.00	0%	1	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00
\$642.00	0%	1	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00
\$624.00	0%	1	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00
\$580.00	0%	1	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00	0%	0	0	\$0.00





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