Agenda

I. Welcome (Ruben)

II. Intro 2024 (Steve)

III. Product updates (Steve/Megan)

IV. CX (Margaret)

V. Customer ideas

VI. Panelists

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CEO Vision on Lead Gen 2024 & Beyond

with Steve Rafferty

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Steve Rafferty

Founder & CEO

steve@activeprospect.com

512-743-0796

Topics

I. ActiveProspect: Our Mission

II. Lead Gen Trends & Challenges

III. Call to Action

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ActiveProspect *today*

200M
Leads certified
per month

3k
Customers
served globally

40k+
Website
installs

500+
Integrations
and add-ons

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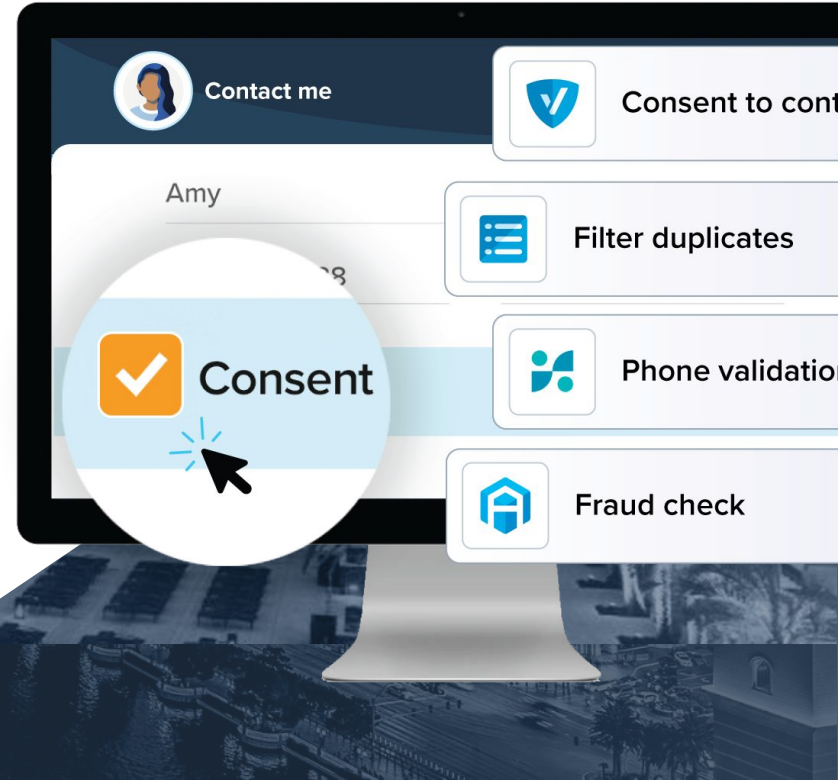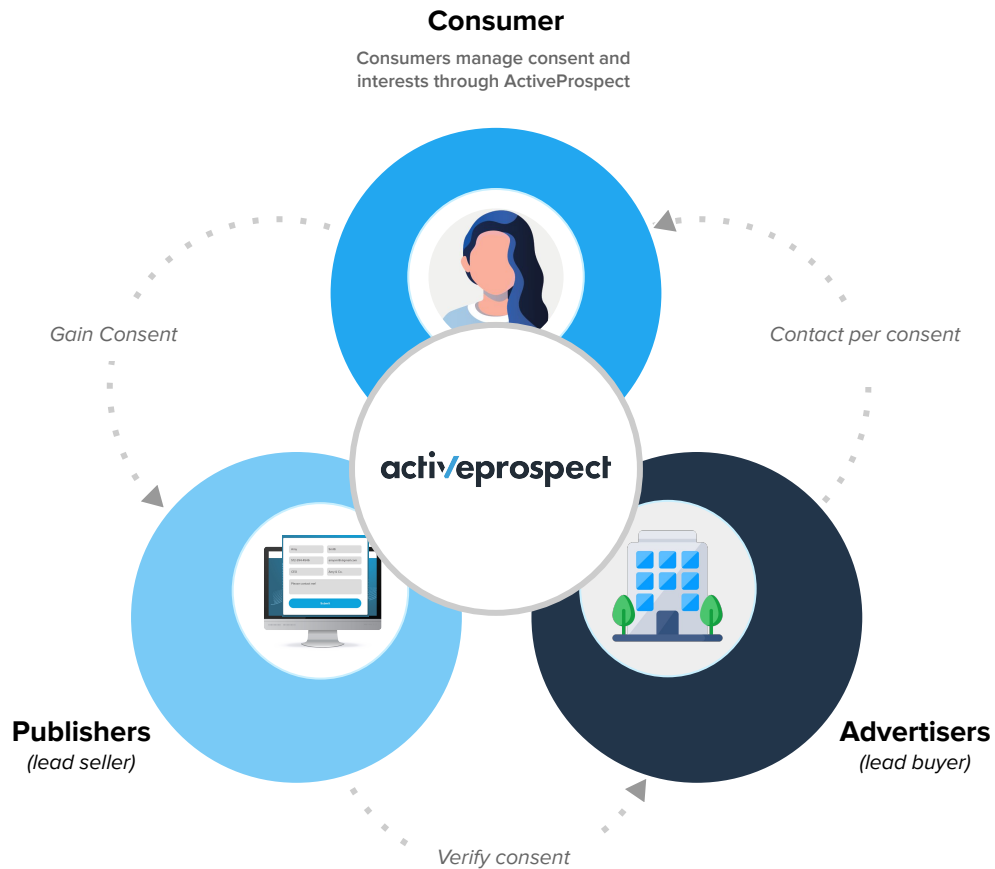
Our mission

Make consent-based marketing the best channel for customer acquisition

What is consent-based marketing?

The practice of only contacting consumers who have given their prior express written consent to be contacted.

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Vision

Consumer
Consumers manage consent and interests through ActiveProspect

Gain Consent

Contact per consent

Publishers
(lead seller)

Advertisers
(lead buyer)

Verify consent

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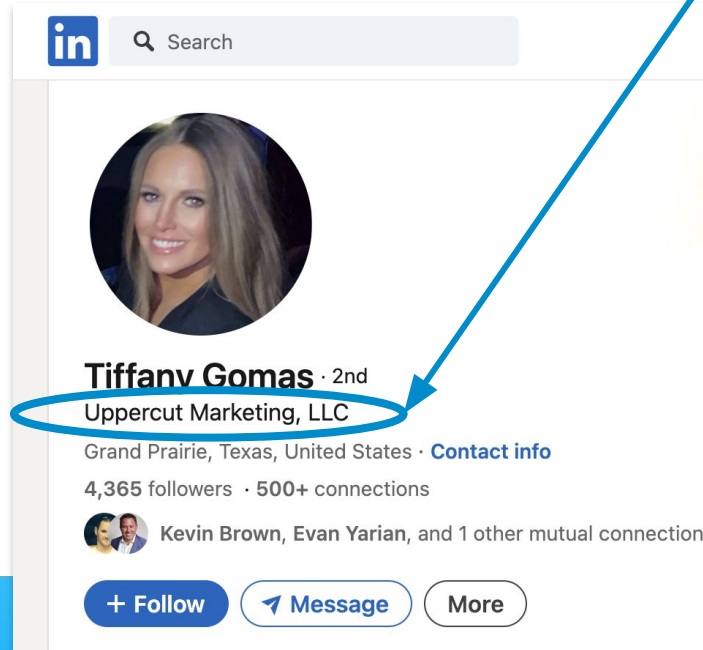# The problem:

3% Conversion rates.

97% of the leads you buy don't convert.
That is very inefficient.

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As marketers, *this* is how many of you feel about the leads you are calling

That 🤬 is NOT real!

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BTW - she works in marketing!

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The ActiveProspect product suite is a complete solution for **consent-based marketing**.

leadconduit

Streamline the cost per lead acquisition process to efficiently acquire customers at scale

trustedform

Provide unbiased, independent certificates of authenticity used for legal compliance and campaign optimization

leadsbridge

Automate your customer acquisition workflows to sync all social data from major ad platforms

suppressionlist

Check an incoming lead against any list to make real-time decisions

Third party add-ons

Enhance leads with access to drag-and-drop add-ons

200M+
Leads certified per month

40,000+
Website installs
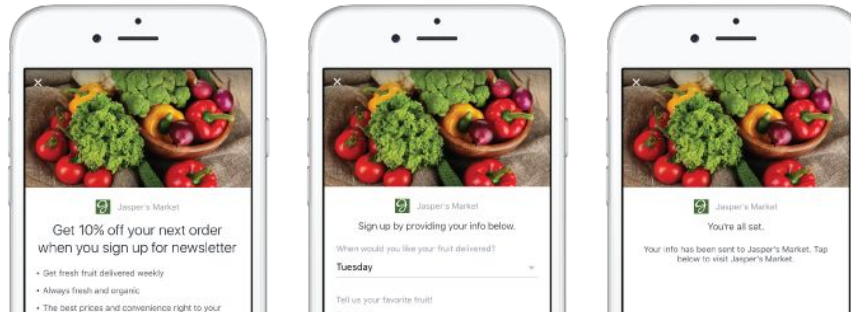
500+
Technology integrations

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Lead Gen Trends & Challenges

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2024 Lead Gen Trends

- AI is everywhere
- Cookie Apocalypse driving demand for first party data
- Major ad platforms getting into lead gen

2024 Challenge: Contacting consumers

Technical Barriers

Calls and texts are blocked by carriers

Carriers now have the ability to block calls that look suspicious, similar to how email providers block spam

Consumer Barriers

Calls/text that make it through are not answered

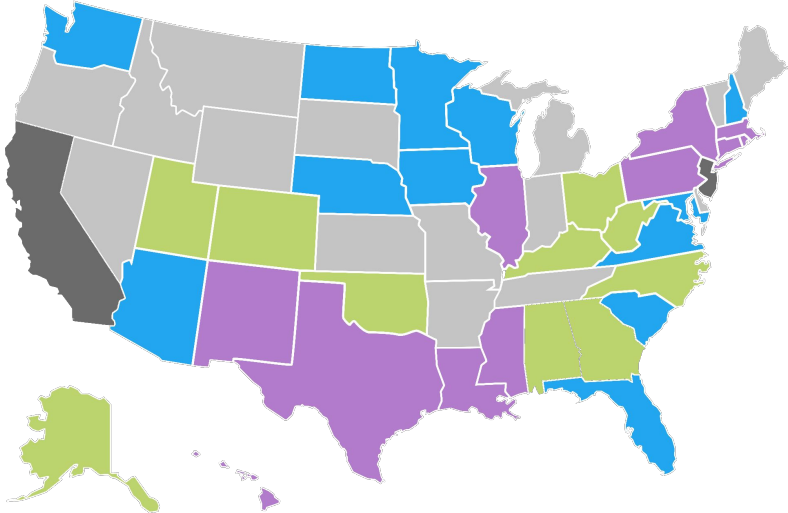Third-party analytics company Hiya estimates that ~95% of calls from an unknown caller are not answered[1]
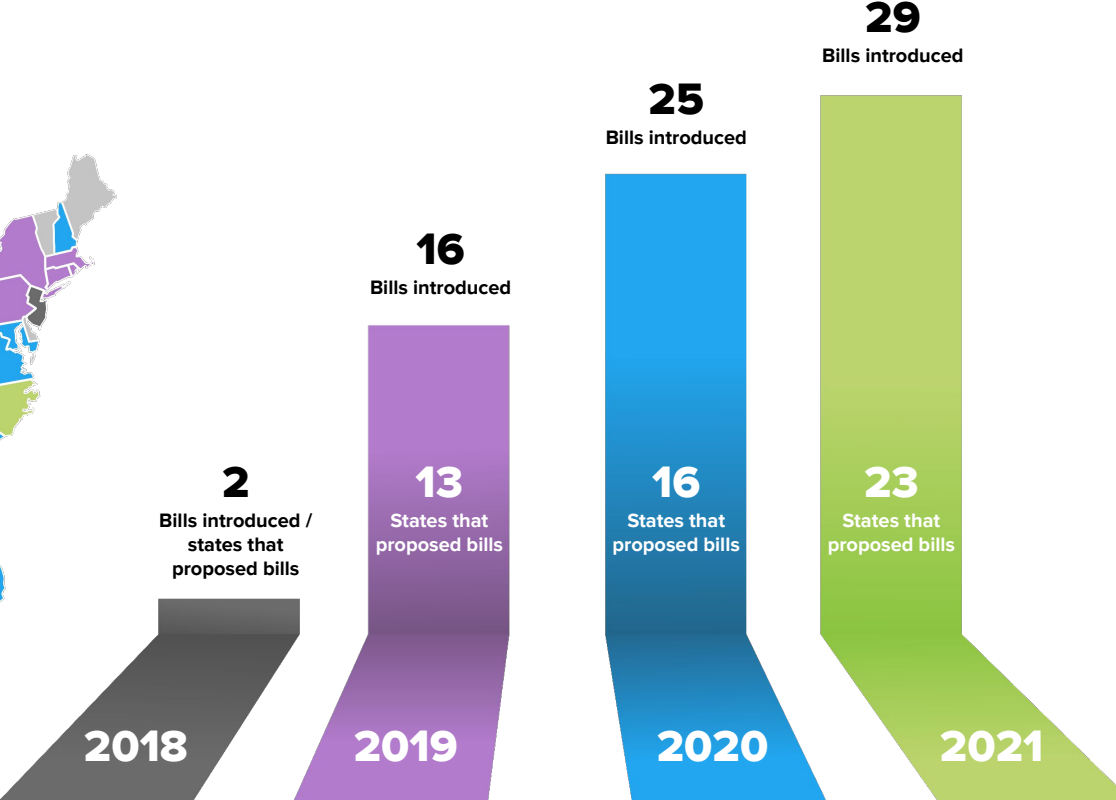
Regulatory Barriers

TCPA liability of $1500 per call/text

Illegal and unwanted calls, including robocalls, are the single largest source of consumer complaints to the FCC

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State laws add to a growing complexity of federal regulations
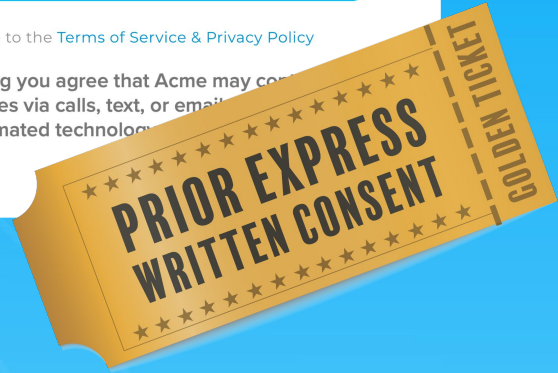
Referenced from iapp.org/resources

29
Bills introduced

25
Bills introduced

16
Bills introduced

2
Bills introduced /
states that
proposed bills

13
States that
proposed bills

16
States that
proposed bills

23
States that
proposed bills

2018

2019

2020

2021

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Prior Express Written Consent is Your GOLDEN TICKET

- With this type of consent, the consumer has specifically expressed interest in your products or services and is expecting your outreach.

- This proof of consent supersedes the various regulatory requirements for consumer outreach, including the Do Not Call list.

"By far the simplest way to assure TCPA compliance is by obtaining valid express written consent—and that consent becomes even more powerful (and easy to use) when it is witnessed and documented by an independent third party like TrustedForm.

Eric Troutman

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Lead generation *under attack* for multi-party *"consent farms"*

FTC

"Operation Stop Scam Calls targets another segment of the robocall ecosystem: "lead generation consent farms." The message should be evident. Companies and individuals that till the soil for illegal telemarketing and then reap financial rewards can expect a bumper crop of law enforcement.

"

FTC Operation Stop Scam Calls
July 18, 2023

FTC Reference Doc

FCC

"We propose to ban the practice of obtaining a single consumer consent as grounds for delivering calls and text messages from multiple marketers on subjects beyond the scope of the original consent.

"

NPRM: Targeting and Eliminating Unlawful Text Messages
February 23, 2023

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Call To Action

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#1 - Fund best practices!
As buyers, you drive the market

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#2 - Please give us feedback today!

#3 - Have fun!

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Customer Experience 2.0

with Margaret Wise

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How do you elevate your CX?

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Principle #1
Your front door is digital (without a ring camera)

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Principle #2
Be a big company that seems small.

Principle #3
Measure success using the Customer Effort Score.

LONG HOME PRODUCTS

ROOFING

Learn more about the Long Process.

Request a free, no obligation in-home consultation and estimate today by filling out the contact form below.

CONTACT US

First Name

Last Name

Email

Phone

Your Message

SEND

LONG HOME PRODUCTS

ROOFING

What is Red Carpet treatment?

We only work with the trained, talented professionals who serve our customers with the respect, patience and understanding that they deserve. Our Red Carpet Service guarantee ensures our customers' homes and properties are treated with respect as we complete the residential work that transforms an ordinary home into a beautiful, efficient sanctuary.

When you purchase our services you can expect The Red Carpet Treatment:

- We arrive on time in a company-identified vehicle
- Our Crew Leader will introduce himself to you upon arrival
- We wear company branded shirts and carry a company ID badge

If installing windows and doors:

- We will offer to wear shoe covers to protect your carpets
- We will put drop cloths down to protect your home
- We will clean your new windows before we leave

If installing roofing and siding:

- We will use tarps to cover and protect your shrubs and outdoor items
- We will use a magnetic sweeper to find any stray nails in your yard

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TABLE BREAKOUTS

Idea Readouts

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10 MIN TABLE BREAKOUTS

What do you do to provide a customer experience that is a *competitive advantage*?

The CX Team

Implementation Engineers

Onboarding

Support Team

Technical Support

Customer Success Managers

+

Main POC > Contracts, Business Strategy, Partner Introductions

→

customersuccess@activeprospect.com

The Best CX Experience

Create a dialogue leading to a strategy that ends in purchases

| **Daily** | **Weekly** | **Monthly** | **Quarterly** |

Daily

Review LeadConduit Dashboard
- Outcome Reasons
- Trends

Weekly

Review LeadConduit Reports
- Rejection reasons
- Appended data results

Monthly

Check Volume Tracker

Recurring Meeting with your CSM

Quarterly

Conversion / Feedback Analysis

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Product Updates & Strategies

with Steve Rafferty & Megan Chavez

3 Things you may not be doing:

- **Direct Marketing on Ad Platforms**
  - Audience retargeting
  - Social Media Bridges

- **Utilizing your lead data to its full potential**
  - Insights and Verify

- **Disposition and Feedback**
  - Automation and subsequent targeting adjustments

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LeadsBridge

- **Allows for audience retargeting**
  - Take advantage of information already in your database

- **Opens up new avenues of social media advertising connections direct to your CRM/System of Record**
  - Tiktok, LinkedIn

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TrustedForm Data Insights and Verify

- **Delivers more information on the potential lead**
  - Can be used to enhance or exclude based on desired personas
  - Choose the insights data that you want

I want to ensure that warm-transfer leads I receive originate only from specific, "white-listed" websites.

Require your source to "ping" you with the certificate URL before accepting the warm transfer. Use TrustedForm Insights to view the originating domain and reject the lead if it is not "white-listed".

I want to ensure purchased leads weren't attracted using a competitor's name.

Use TrustedForm Insights and input your competitor's name as a forbidden scan term to fail the lead if it is found on the page that the lead generation event occurs.

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Feedback

- **Are you currently monitoring lead performance and disposition data**

- **Capture information and lead outcome in an automated fashion**

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Open Discussion

Forum for clients to speak and ask questions

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Sponsor Panel

homeyou   Leap™   buyerlink get local

Windows Monthly Volume

< 52.4   52.4–103.8   103.8–155.2   155.2–206.6   ≥ 206.6

Seattle

Minneapolis

Boston

Detroit

New York

Chicago

Philadelphia

Denver

Washington D.C.

Saint Louis

Los Angeles

Phoenix

Atlanta

San Diego

Dallas

Anchorage

Houston

New Orleans

Tampa

Honolulu

Miami

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homeyou
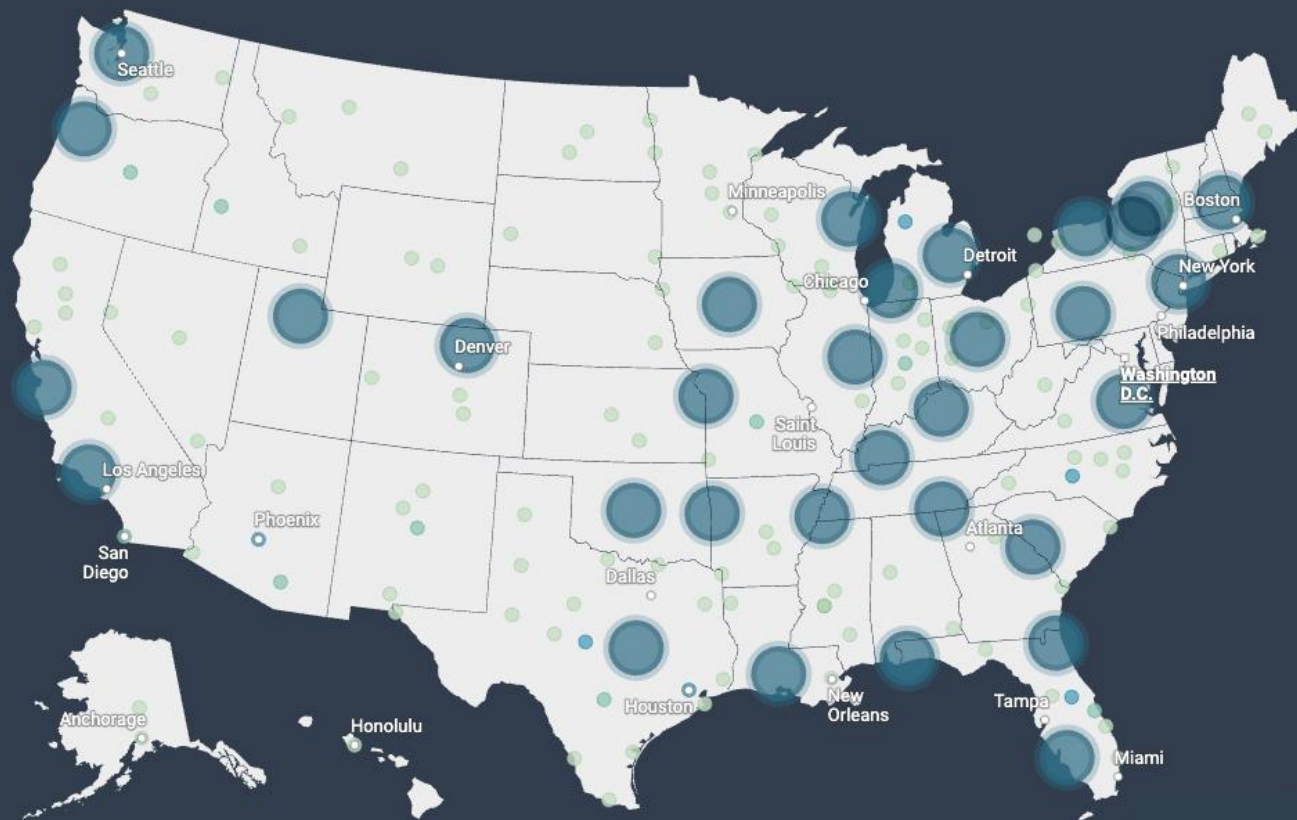
Bathroom Remodeling Monthly Volume

Legend: < 57.4 | 57.4–113.8 | 113.8–170.2 | 170.2–226.6 | ≥ 226.6

Seattle
Minneapolis
Detroit
Boston
Chicago
New York
Denver
Philadelphia
Washington D.C.
Saint Louis
Los Angeles
Atlanta
San Diego
Phoenix
Dallas
Anchorage
Honolulu
Houston
New Orleans
Tampa
Miami

homeyou
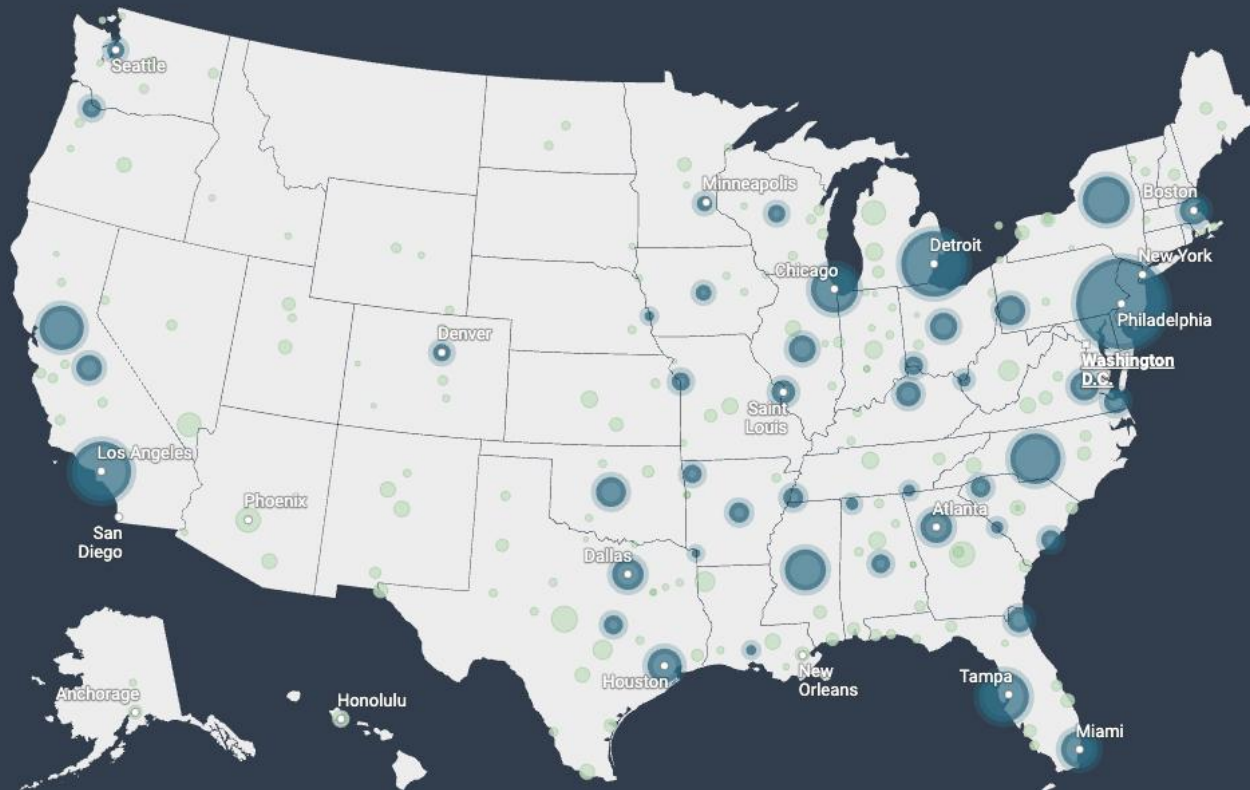
Roofing Monthly Volume

< 91 | 91–181 | 181–271 | 271–361 | ≥ 361

Seattle
Minneapolis
Detroit
Boston
Chicago
New York
Philadelphia
Denver
Washington D.C.
Saint Louis
Los Angeles
Phoenix
San Diego
Atlanta
Dallas
Anchorage
Honolulu
Houston
New Orleans
Tampa
Miami

homeyou
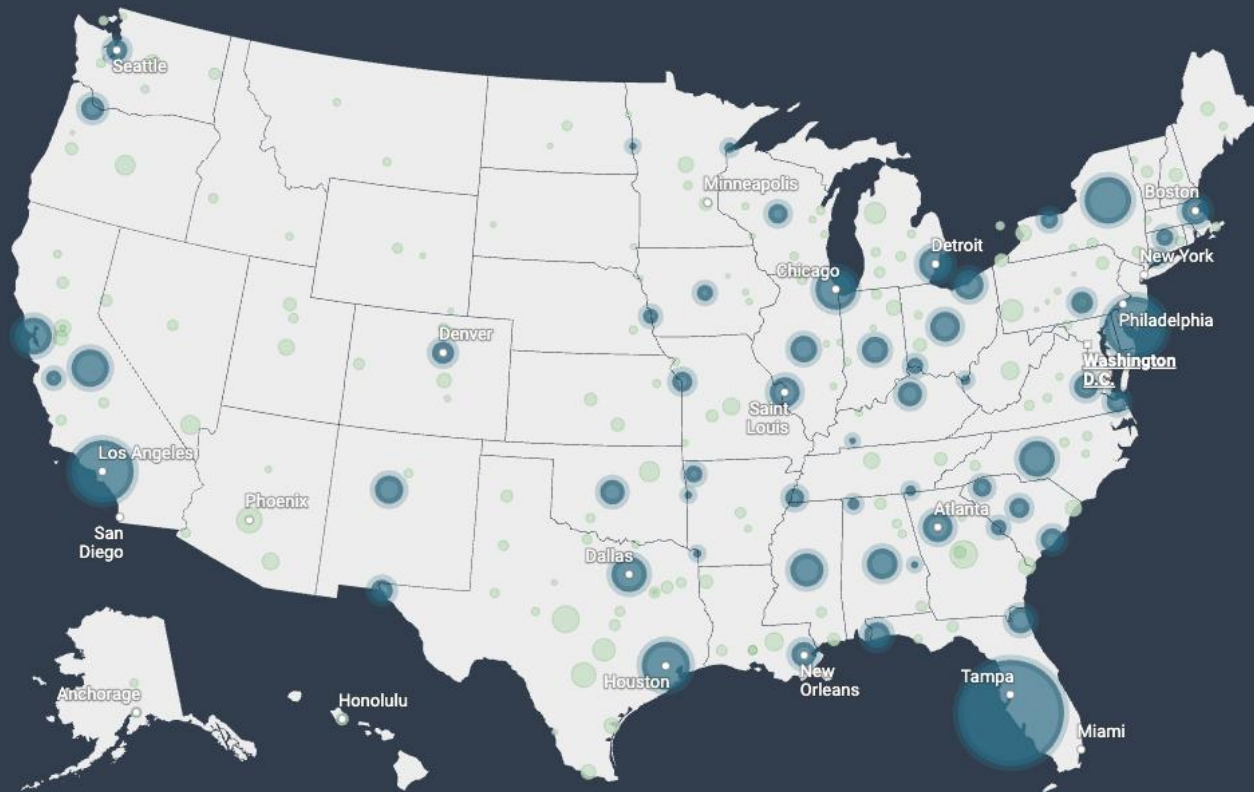
Siding Monthly Volume

< 33　33–65　65–97　97–129　≥ 129

Seattle

Minneapolis

Detroit　Boston

Chicago　New York

Denver　Philadelphia

Saint
Louis　Washington
D.C.

Los Angeles

Phoenix　Atlanta

San
Diego

Dallas

Anchorage　Honolulu　Houston　New
Orleans　Tampa　Miami

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homeyou
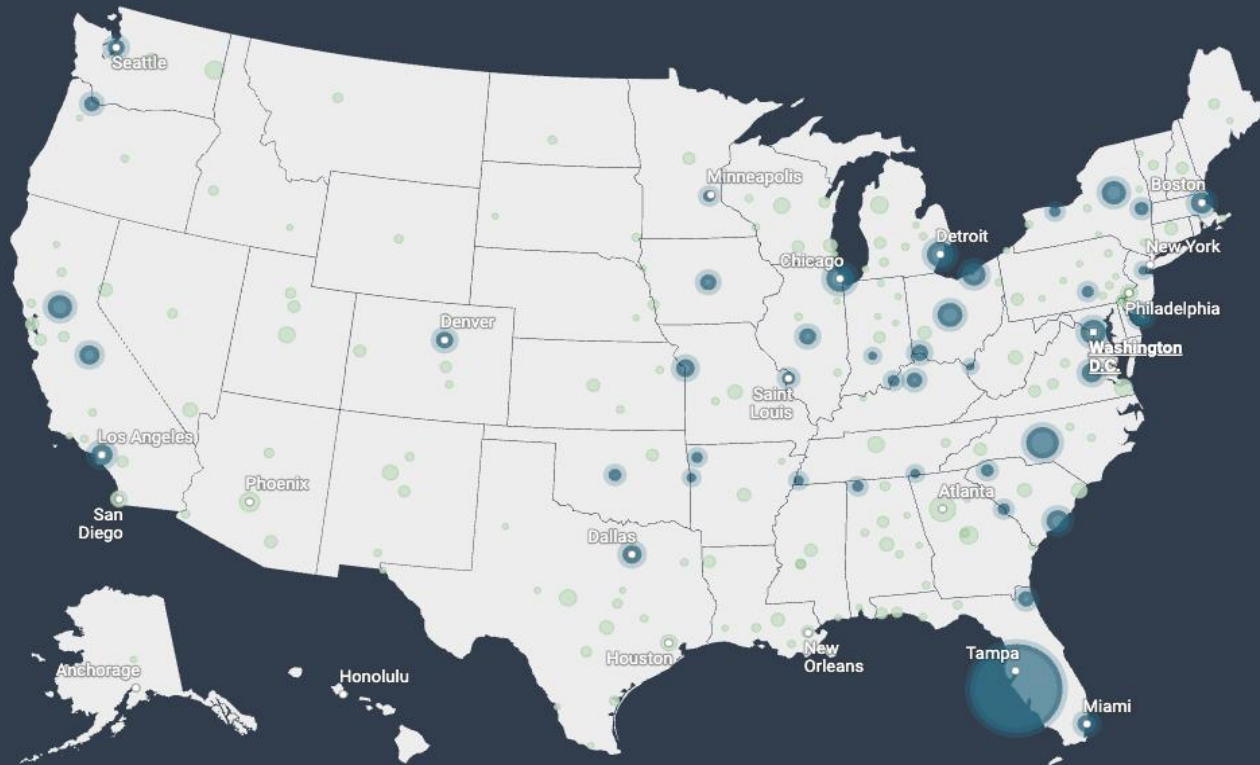
General trends 2023

1 **Increase in boomer population driving the majority activity**

home improvement project interest up 59% from 2018–2022

2 **Millennials fastest growing homeowner segment**

up to 48% –> 20% growth in last 4 years; expect to see this climb to 65% by 2025 even w/ higher interest rates.

3 **Online Search volume in key categories (bathroom, kitchen, windows, roofing) up**

~5% in 2023 over 2022; but up over 300% over last 4 years

Buyerlink Key product channels

2023 YTD

HS Traffic

7.2M
Users sent to partner sites

430K
Leads

12,960
Projects

$24M
Sales value

↑8%
From 2022

HS Leads

153K
Leads

14%
Set Rate

4,915
Projects

$72M
Sales value

↑19%
From 2022

HS Warm Transfers

95K
Warm Transfers

38%
Set Rate

6,069
Projects

$113M
Sales Value

↑36%
From 2022

Future Outlook

HOME SERVICES

✓ Expect online search volume to remain flat Y/Y at this point, seeing stronger growth in new HS verticals (cabinet refacing, concrete driveway, decks)

✓ TCPA changes will support lead generators; hurt lead aggregators that do not control their own funnels

✓ Younger (millennial) demographic will further erode traditional call center metrics (lower call contact rate);

  ○ Shift towards online/text appointment scheduling

✓ More outsourcing of specific call center functions; aged leads and initial outreach

Leap, LLC
Financing Platform Insights

—

The Solution to Scale Your Business
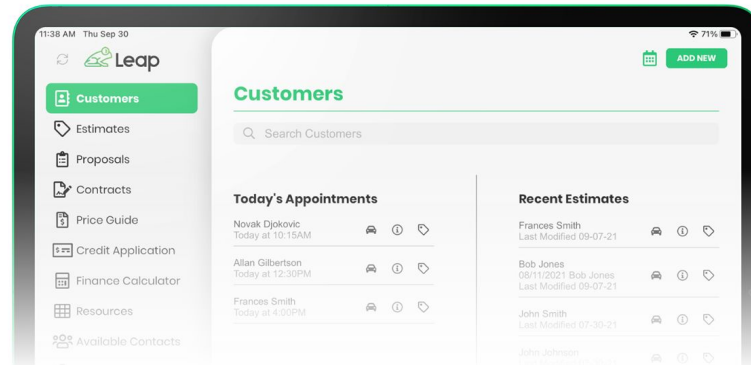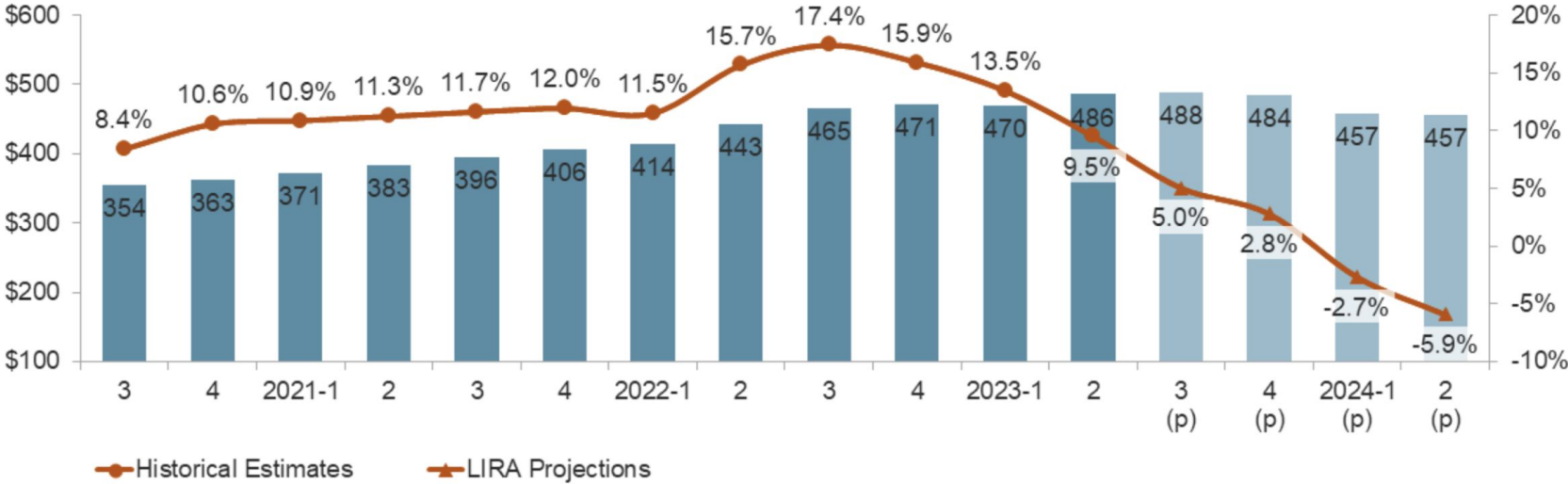
Leading Indicator of Remodeling Activity – Second Quarter 2023

**Homeowner Improvements & Repairs**
Four-Quarter Moving Totals
Billions

Four-Quarter Moving
Rate of Change

Chart data (bar values = Four-Quarter Moving Totals in Billions; line values = Rate of Change):

Quarter	Billions	Rate of Change
3	354	8.4%
4	363	10.6%
2021-1	371	10.9%
2	383	11.3%
3	396	11.7%
4	406	12.0%
2022-1	414	11.5%
2	443	15.7%
3	465	17.4%
4	471	15.9%
2023-1	470	13.5%
2	486	9.5%
3 (p)	488	5.0%
4 (p)	484	2.8%
2024-1 (p)	457	-2.7%
2 (p)	457	-5.9%

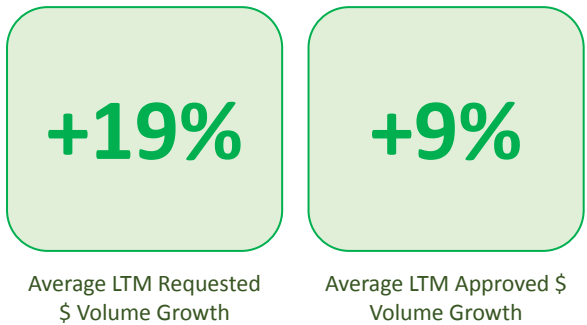Legend: Historical Estimates · LIRA Projections

Notes: Improvements include remodels, replacements, additions, and structural alterations that increase the value of homes. Routine maintenance and repairs preserve the current quality of homes. Historical estimates since 2021 are produced using the LIRA model until American Housing Survey benchmark data become available.

Joint Center for Housing Studies of Harvard University JCHS

Leap Top Customer Segment Lending Performance Trends [1]

Total Average Financing Status as % of Requested [2]

75% **22%** **22%**

■ Approved
■ Declined
■ Pending
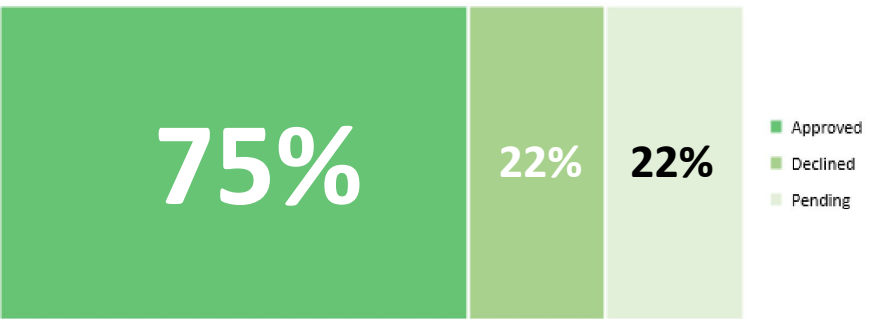
Financing Status Dollar Volume Growth

+19%

Average LTM Requested $ Volume Growth

+9%

Average LTM Approved $ Volume Growth

YoY Q3 Requested Application Dollar Volume Growth

+27%
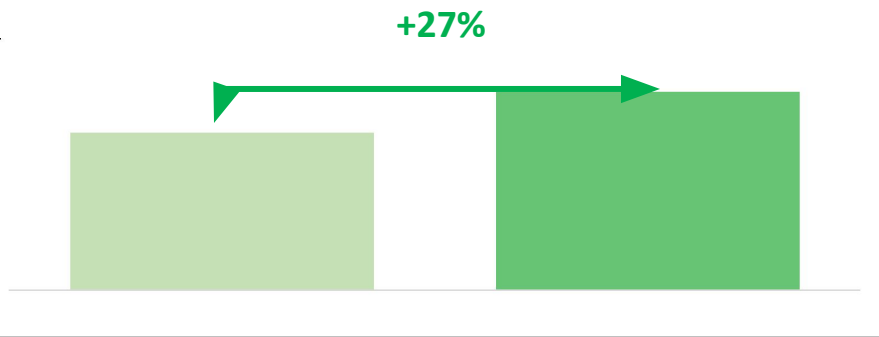
Total Requested Application Volume

$677M

~ Total Dollar Value in Requested Applications

31k

~ Total Requested Application Count
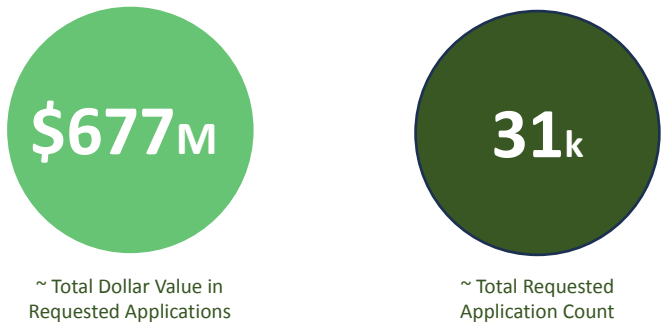
[1] Based on LTM data
[2] Combined for >100% due to ability of being approved for over 100% of requested

Leap

Why Does Your Business Need *TrustedForm*?

Legal Protection
Store documentation of lead events for compliance with regulations like TCPA, CASL, etc.

Brand Protection
Verify your brand is being presented properly and leads are coming from approved sites.

Data Insights
Start identifying and understanding the attributes of your ideal lead.

Actionability
Use this data to optimize your buying strategies and increase the actionability of your leads.

Provide independent documentation of lead events with *TrustedForm*

- ✓ Time Stamp
- ✓ Time on Page
- ✓ Lead Age
- ✓ IP Address
- ✓ Geo Location
- ✓ Browser Type
- ✓ Operating System
- ✓ Session Replay

ACTIVEPROSPECT
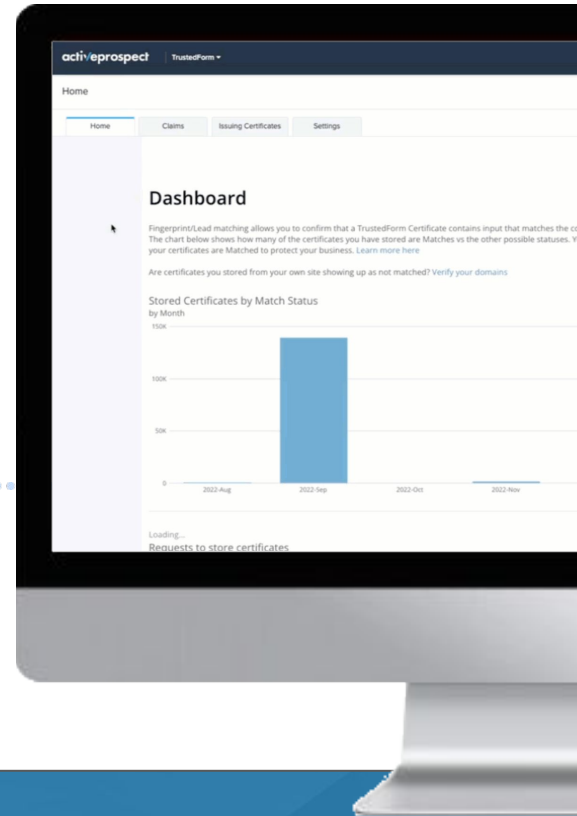
Optimize Your Lead-Buying Strategy with *TrustedForm Insights*

Originating Domain

Identify the best lead sources for your business by tracking leads back to the site that generated them, regardless of where you bought them.

Geolocation

Only purchase the leads that are generated in your geographic footprint (and are most likely to become customers).

Page scan

Check the text of the page your leads are generated on to determine if they were incentivized or presented specific information.

Lead Age

Timing is critical for all real-time leads. Lead age ensures the leads you're purchasing are actively shopping for your product or service.

IP Address

Reject leads from IP addresses known to be fraudulent or used frequently.

Form Input Method

Identify how consumers complete a lead generation form and avoid purchasing leads with only pasted information.