



“Performance Software to Automate Lead Optimization”

What is LeadSherpa?

Lead acquisition platform that combines lead management functionality with automated optimization technology to drive the performance of lead buying campaigns.

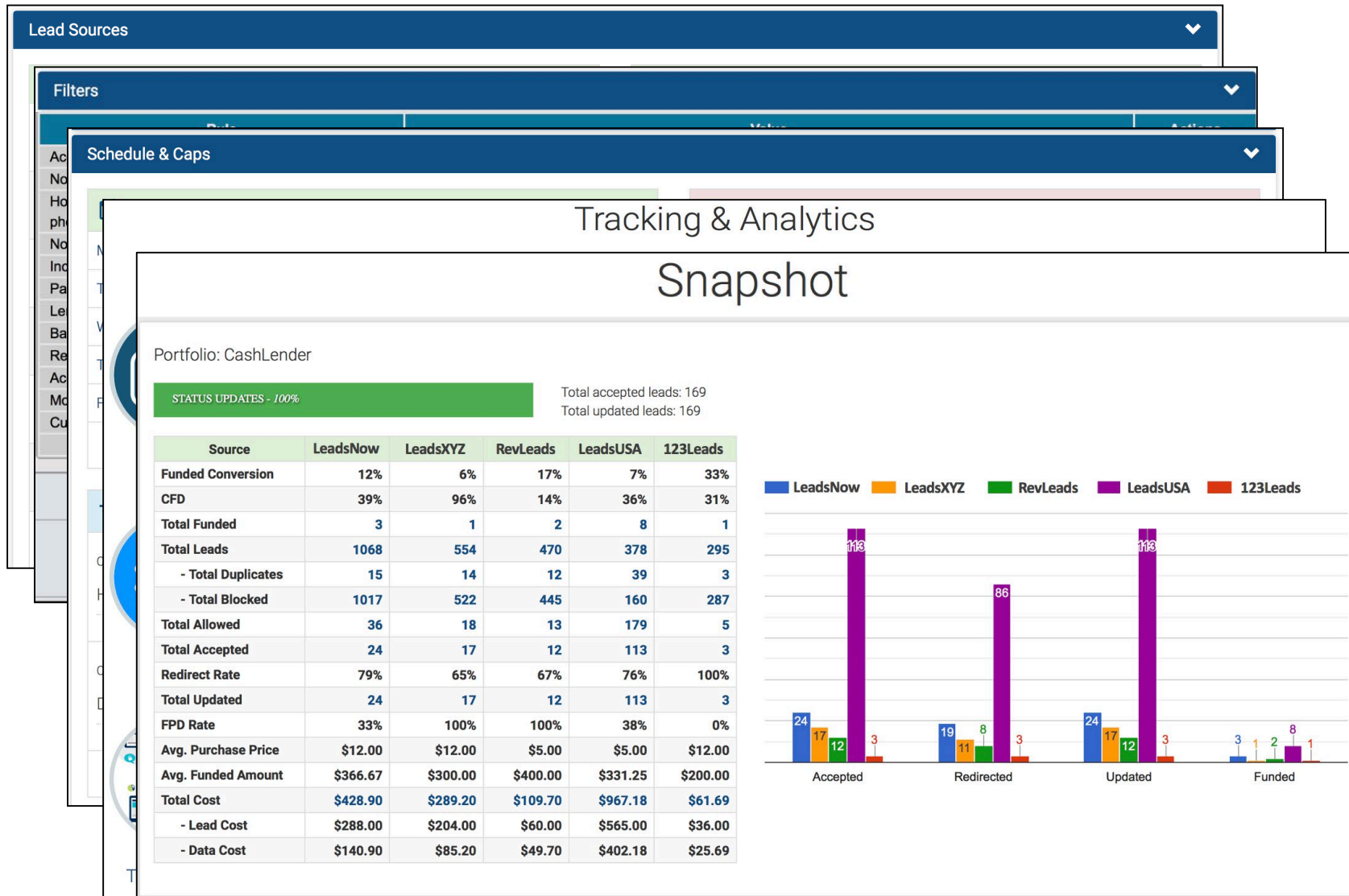
- ✓ **Lead Management Tools**
Lead Sources, Filters, Decisioning Waterfalls, Scorecards, Champ / Challenger
- ✓ **3rd Party Data Integrations**
Fraud, Conversion & FPD
- ✓ **Reporting & Analytics**
Real-time Performance Reporting and Analytics
- ✓ **Optimization Suite**
Lead Source, Budget, SubID, Footprint & Scorecard Optimization
- ✓ **Agency Support**
Lead Buying Strategy, Campaign Management, Invoice Consolidation / Payment

Lead Management Tools

Lead Optimization Tools



Lead Management Tools



- Lead Source Integrations

- Lead Filter Management

- Lead Schedule, Caps

- Tracking & Analytics

Waterfalls & 3rd Party Data

IV. Prescreen Modules

1. SubID Optimization

☐ Map to Performance Target(s)

Sample Size: 10

2. ABA C

☐ Map to Performance Target(s)

Sample Size: 10

3. IP Add

☐ Map to Performance Target(s)

Sample Size: 10

4. Email

☐ Map to Performance Target(s)

Sample Size: 10

5. Mailin

☐ Map to Performance Target(s)

Sample Size: 10

4. Email Verification

☐ Map to Performance Target(s)

Sample Size: 10

5. Mailing Address Verification

☐ Map to Performance Target(s)

Sample Size: 10

6. Mobile Number Verification

☐ Map to Performance Target(s)

Sample Size: 10

+ ADD PRESCREEN MODULE

Select Preferences

☒ Redirect Rate Alert
Minimum Redirect Rate: 70%

☐ Prove All New Tags

☐ Gold Only

V. Data Vendor Modules

1. ExpectID Email

☐ Map to Performance Target(s)

3. EB Conversion Fraud

☐ Map to Performance Target(s)

Scorecard Manager

SAVED SCORECARDS

ADD NEW SCORECARD

Name	Created Date	Actions		
TMX_prescreenMax_tran500	January 11, 2019	EDIT	DELETE	EXPORT
CPF	January 15, 2019	EDIT	DELETE	EXPORT
Prescreen and Tran Internal DB	January 21, 2019	EDIT	DELETE	EXPORT
CL OK PrescreenMax IDology Tran max	March 07, 2019	EDIT	DELETE	EXPORT
CL OK PrescreenMax IDology-Only max	April 10, 2019	EDIT	DELETE	EXPORT
TMX_prescreenMax_tran250	April 16, 2019	EDIT	DELETE	EXPORT
FST Clarity	May 07, 2019	EDIT	DELETE	EXPORT
TMX_prescreenMax_WPP	June 07, 2019	EDIT	DELETE	EXPORT
CL OK Prescreen20 IDology Tran max	June 12, 2019	EDIT	DELETE	EXPORT
CL OK Prescreen20 IDology-Only max	June 12, 2019	EDIT	DELETE	EXPORT

- Waterfalls / Decisioning Workflows
- 3rd Party Data Products
- Scorecard Management

Optimization Suite

Budget Optimizer

Lead Source Optimizer

Scorecard Optimizer

SubID Optimizer

EXPORT TO XLS

EXPORT TO CSV

STATUS UPDATES - 97%

Total accepted leads: 7446

Total updated leads: 7227

	Campaign	Source	Tag	Conversion	CFD	Updated	Status	Rehab Cycle	Color Retries	Actions
+	CashLender	LeadsNow	1065251	20%	12%	08/13/2019 08:54:34	green	1	0	Reset
+	CashLender	LeadsNow	656649	0%	0%	07/26/2019 00:38:32	green	1	1	Reset

	Campaign	Source	Tag	Conversion	CFD	Updated	Status	Rehab Cycle	Color Retries	Actions
+	CashLender	LeadsNow	1035027	20%	11%	05/29/2019 00:53:21	yellow	1	0	Reset
+	CashLender	LeadsNow	1058783	20%	13%	07/26/2019 00:38:32	yellow	1	0	Reset
+	CashLender	LeadsNow	1060615	20%	11%	08/13/2019 08:54:34	yellow	1	0	Reset

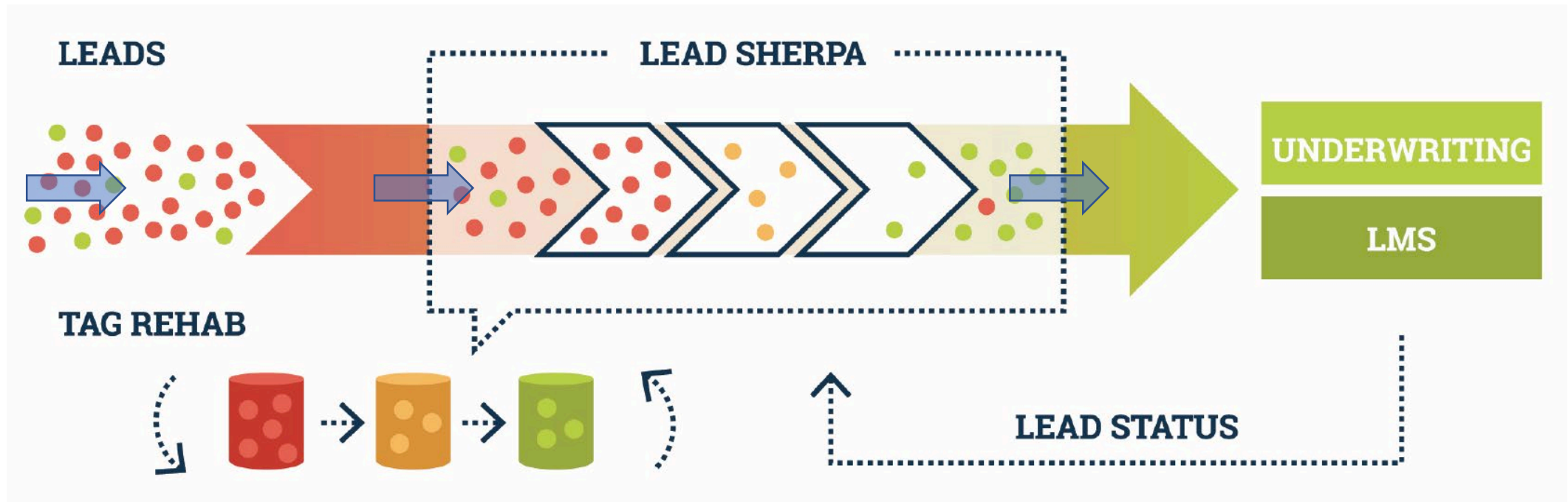
	Campaign	Source	Tag	Conversion	CFD	Updated	Status	Rehab Cycle	Color Retries	Actions
+	CashLender	LeadsNow	1001037	0%	0%	08/09/2019 00:38:44	red	1	0	Reset
+	CashLender	LeadsNow	1001038	0%	0%	08/08/2019 00:38:31	red	1	0	Reset
+	CashLender	LeadsNow	1035026	0%	0%	06/04/2019 00:37:32	red	1	1	Reset

	Campaign	Source	Tag	FPD Rate	Updated	Status	Rehab Cycle
+	CashLender	LeadsNow	1035026	20%	06/05/2019 01:00:33	FPD	0

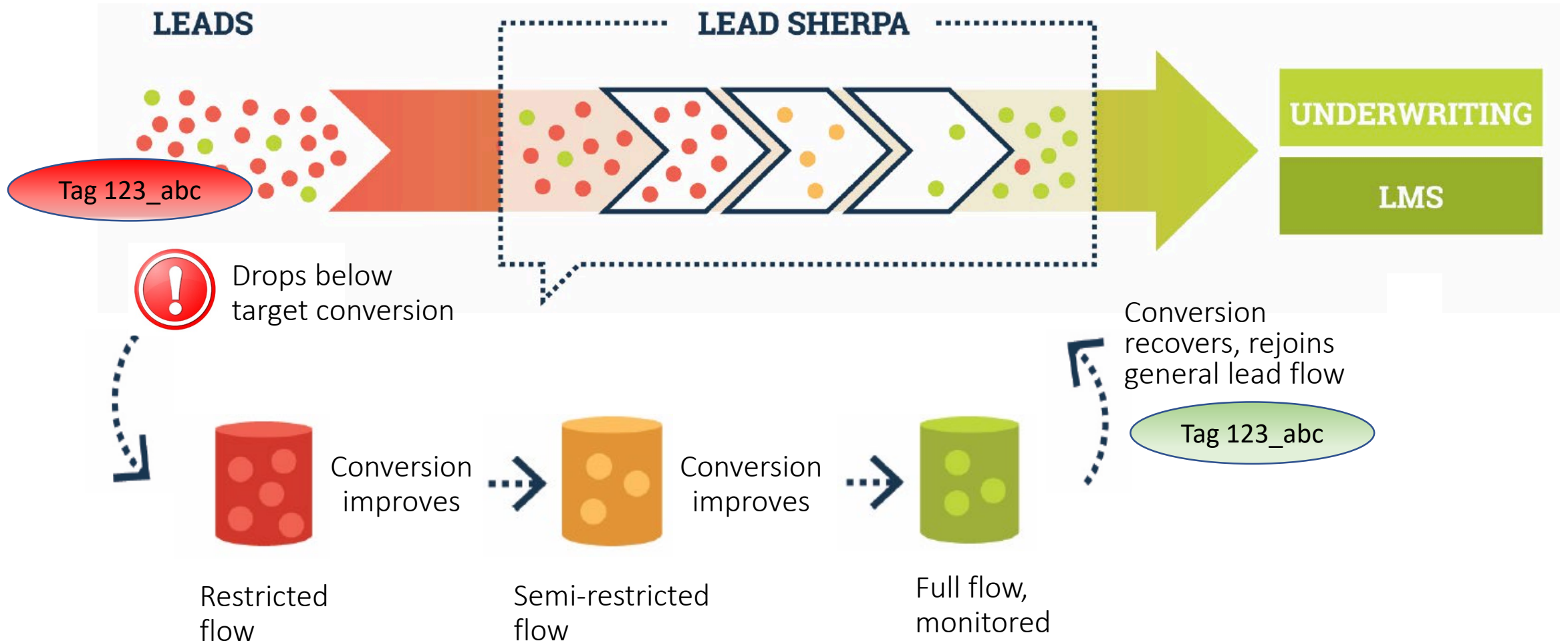
- Budget Optimizer
- Lead Source Optimizer
- Scorecard Optimizer
- SubID Optimizer (“Tag Rehab”)

Example - SubID Optimization

Software restricts underperforming SubID's ("tags") before incurring underwriting and decisioning costs.



Tag Rehab



Come See Us – Booth #49



“The platform is intuitive, effective and simple to use. They have a fresh approach to acquiring and managing leads utilizing technology to optimize lead sources, price points, volume.” - Tribal Lender

“As a storefront lender, we struggled to find the right balance to make our online portfolio convert leads more efficiently. LeadSherpa has really helped us evolve our online lending efforts”- State Licensed

“The Agency Support component of the platform has been terrific and has allowed my team to focus on the customer while the LeadSherpa team actively manages lead performance, adding new lead sources and optimizing all of our campaigns”- State Licensed

