

DOTS Lead Validation

SCORE AND ENHANCE LEAD DATA QUALITY IN REAL-TIME

OVERVIEW

DOTS Lead Validation is Service Objects' newest XML Web Service that provides comprehensive validation and correction of lead data in real-time. The result is an enhanced lead and numeric score from 0-100. The score is based on the lead's six components (business/consumer name, street address, phone, email, IP) and the correlation between them. It can be used behind the scenes of a Web form (point-of-entry validation), requiring users to input valid data. Alternatively, it can be integrated with any CRM or internal system to improve overall business processes. DOTS Lead Validation is the industry's only comprehensive validation solution that cross-validates all six critical components, yet remains simple by encapsulating all the complex scoring logic into an easy to use overall score.

FEATURES

- B2B and B2C Lead Validation.
- Unique and accurate comprehensive cross-validation.
- Configurable recommendation – Accept, Reject, or Review.
- Calibrated overall lead score from 0-100.
- Extensive test-type anthology for customized lead scoring.
- Warning flags for immediate point-of-entry validation.
- Breakdown by section quality and corrected information.
- Industry-leading 130 step lead verification process.
- Three new databases with over 230 million new data records for a total of over 800 million data records.
- Real-time XML Web Service interface. Batch also available.
- Any system can easily integrate using standard IP protocols.
- Typical response-time of 1.10 seconds.

BENEFITS

- Save time and money by avoiding and filtering bad leads.
- Stand out by selling the highest data quality leads.
- Generate better leads by requiring users to input valid data with point-of-entry validation.
- Convert more leads with corrected and enhanced data.
- Maximize lead currency by streamlining validation.
- Improve marketing statistics by incorporating lead quality.

WHAT IS LEAD VALIDATION?

DOTS Lead ValidationSM is the process of evaluating the contact data quality of an online transaction. A lead's value is directly proportionate to its accuracy, completeness, correctness, and timeliness. Service Objects uses a unique combination of proprietary databases and matching algorithms to verify a lead's information. The heart of our service is a system for ranking contact information developed many years ago by our founders. Our lead validation system relies on multiple databases and algorithmic patterns to provide an indicator of an online lead's value.

ACCEPT Score: 94/100

Robert Miller
bob.miller@motioneng.com

Danaher Motion Company
33 South La Patera Lane
Santa Barbara, CA 93118
(805) 681-3300
(805) 681-3311 (fax)
IP Address: 70.184.41.238

Domain of email and company name match database records

Valid name, email and address

Correction: Actual Zip code is 93117 not 93118

Phone numbers match company name and address...

Figure A: Accept Lead – This “accept” lead received an overall score of 94. All components of this lead were valid and cross-referenced with each other, with the exception of the zip code which was off by only one number.

REJECT Score: 36/100

Bob Smith
1567 Broadway
New York, NY 10036-1517

Phone 1: 805-966-7424
Email: tim_hogan@hotmail.com
IP address: 204.17.26.5

Poor geographic fidelity. The street address is in NY, the phone exchange is in CA and the IP address is in AZ.

The phone record returns Edward Russell which is not a variation of Bob Smith and the email does not contain either name.

Figure B: Reject Lead – This “reject” lead received an overall score of 36. All components of this lead were valid, but were so disparate from one another that overall, this lead was rejected.

WHAT CHECKS DOES IT DO?

1. Name Validation

- Business
- Consumer
- Vulgar, celebrity, bogus names
- Recognized first/last names, name variations

2. Street Address Validation and Correction

CASS and Delivery Point Validation
Corrected to USPS preferred format

3. Telephone Number Validation

Wireless phone record lookup
Disconnected phone record lookup
Exchange lookup (location, landline/wireless)
Phone record lookup (name, address, bus./res.)

4. Email Address Validation and Correction

Bogus, syntax, domain specific syntax
DNS and SMTP

5. Internet (IP) Address Validation

Geographic location
Fraudulent IP addresses

6. Comprehensive Cross-Validation

Geographic fidelity
Calculated into overall score

HOW IT WORKS

Cross-Validation—is a critical component of the data validation process. However, because most validation tools focus only on street address, phone number, and name, they are limited in terms of possible cross-referencing. DOTS Lead Validation uses email and IP address, business name to email, IP address, and physical address and phone number in addition to other components to strengthen its cross-referencing. Name and name variations (nick-name, surname, etc.) are cross-referenced with the data from the phone and email fields. Phone records are also cross-referenced with the name and street address.

Geographic Fidelity—is geographic cross-referencing where its affect is scaled by the distance between the geo-coded components, not by comparing components based on locality name. This avoids the problem of city/state lines or alternate city names affecting the score instead of the actual distance between points. Evaluating the actual distance allows for a finer granularity of scoring compared to the more basic same city, same state checks.

Configurable Scoring Engine—allows our calibration specialists to finely tune the scoring of specific test types, creating new test-types for clients with more unique scoring needs.

This feature allows Service Objects to quickly integrate new validation and cross-referencing into the system without effecting the client. DOTS Lead Validation provides simple and flexible client integration while enabling comprehensive lead validation and scoring.

Data—is a crucial component for any automated validation solution. DOTS Lead Validation uses an extensive span of over 100 data sources that contain an estimated 3 billion data records. Service Objects is constantly updating, improving, and acquiring new data sources.

XML RESPONSE EXAMPLE

```
<?xml version="1.0" encoding="utf-8" ?>
- <Contact_V2 xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  xmlns="http://www.serviceobjects.com/">
  <NameIn>Geoff Grow</NameIn>
  <BusinessNameIn>Service Objects</BusinessNameIn>
  <Address1In>802 E Cota St</Address1In>
  <Address2In />
  <CityIn>Santa Barbara</CityIn>
  <StateIn>CA</StateIn>
  <ZipIn>93101</ZipIn>
  <CountryIn>USA</CountryIn>
  <Phone1In>8059631700</Phone1In>
  <Phone2In />
  <EmailAddressIn>ggrow@serviceobjects.com</EmailAddressIn>
  <IPAddressIn>98.173.200.203</IPAddressIn>
  <GenderIn>Male</GenderIn>
  <DateOfBirthIn />
  <UTCaptureTimeIn />
  <FirstNameOut>Geoff</FirstNameOut>
  <LastNameOut>Grow</LastNameOut>
  <GenderOut>MALE</GenderOut>
  <Address1Out>802 E Cota St</Address1Out>
  <Address2Out />
  <CityOut>Santa Barbara</CityOut>
  <StateOut>CA</StateOut>
  <ZipOut>93103-3129</ZipOut>
  <IsDeliverableOut>TRUE</IsDeliverableOut>
  <Phone1LineOut>LANDLINE</Phone1LineOut>
  <Phone1TypeOut>BUSINESS</Phone1TypeOut>
  <Phone2LineOut />
  <Phone2TypeOut />
  <EmailOut>ggrow@serviceobjects.com</EmailOut>
  <IPCountryOut>US</IPCountryOut>
  <LeadTypeOut>UNKNOWN</LeadTypeOut>
  <AlternativePhone />
  <AlternativeName />
  <AlternativeAddress />
  <TestType>business</TestType>
  <OverallCertainty>98</OverallCertainty>
  <OverallQuality>Accept</OverallQuality>
  <NameQuality>Accept</NameQuality>
  <EmailQuality>Accept</EmailQuality>
  <IPQuality>Accept</IPQuality>
  <PhoneQuality>Accept</PhoneQuality>
  <AddressQuality>Review</AddressQuality>
  <BusinessQuality>Accept</BusinessQuality>
- <PhoneContacts>
  - <PhoneContact>
    <Name>SERVICE OBJECTS</Name>
    <Address />
    <City>SANTA BARBARA</City>
    <State>CA</State>
    <Zip />
    <Type>BUSINESS</Type>
  </PhoneContact>
</PhoneContacts>
<WarningDesc1 />
<WarningCode1 />
<WarningDesc2 />
```

This is a sample of the XML Response generated from our DOTS Lead Validation Web Service using sample company and contact information. Service Objects validates this information and returns to you both the original and corrected inputs. Along with this set of data, we return an overall numeric score representing the level of certainty that the given lead is valid. The method of calculating this overall lead score is customizable to fit your company's specific needs, with an extensive test-type anthology for your business to choose from. Our suggested interpretation of these scores (e.g. Accept, Reject, or Review) is included via the "OverallQuality" node, and is also customizable to fit each client's unique needs.

Service Objects recognizes that every company has unique lead priorities, and has therefore designed DOTS Lead Validation to be flexible, comprehensive, and easy to use.

CALIBRATION

There are several pre-configured test-types for the client to choose from, one for each common vertical. Selecting the correct test-type and calibrating the accept/reject thresholds (red vertical lines below) generally accommodates most business needs. However, for customized requirements, Service Objects creates special test-types as needed.

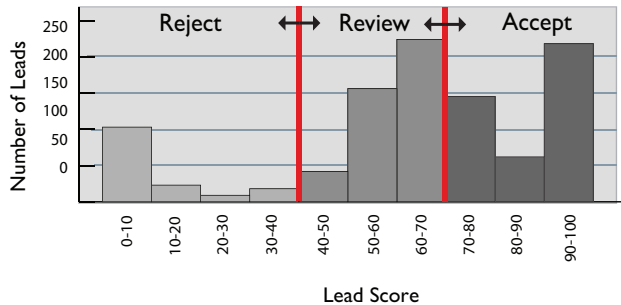


Figure C: Lead Score Histogram – Above is a typical distribution of 1000 leads. Notice it has 3 maxima which help determine proper accept/reject thresholds. Note that both accept/reject thresholds (red vertical bars) and internal scoring (numeric score calculation) are highly configurable for each client.

KEY DATA SOURCES

- Billing Database
- Wireless Contact Database
- Firmographic Database
- USPS Address CASS & DPV Data
- Real-time Directory Assistance Data
- NPA-NXX Phone Exchange Data
- US Census & TIGER/Line Data
- First & Last Name Databases
- Bogus String & Pattern Databases
- Valid/Invalid/Catch-all Email Server Data
- IP Provider & Fraudulent IP Data

INTEGRATION & SUPPORT

Standard integration of DOTS Lead Validation is very straightforward and takes a developer only days to implement. Almost any language can integrate with DOTS Web Services, allowing users to program their applications in the language of their choice. Service Objects also offers a developer's guide and sample code for most programming environments. Service Objects' expert developers are ready to help with your integration process and can even write custom example code for you. They are also available to discuss integration quality and verify that it is fully robust.

Once fully integrated, the Service Objects support team is always ready to answer questions and help you with any issues that may arise. In the event of a problem with the service, a support ticket will be created immediately and a member of the support team will contact you within 90 minutes.

SECURITY & AVAILABILITY

- HTTPS encrypts sensitive data sent to and from the DOTS Lead Validation Web Service.
- All data is protected by an internal privacy policy and security guarantee.
- No customer data is retained or stored.
- A 99.995% Service Level Agreement is provided.
- Third Party Sentry testing immediately notifies Service Objects' technicians of issues.
- Primary and backup data centers on opposite coasts.
- Fully redundant, load-balanced hardware and Internet connections are used.

EMERGENCY SUPPORT

Emergency support is available 24/7, should you need to speak with an engineer immediately.

NEXT STEP

TO TRY AN ONLINE DEMO, SIGNUP FOR A FREE 30-DAY TRIAL; OR, TO LEARN MORE ABOUT DOTS GEOPHONE PLUS PLEASE VISIT:

www.serviceobjects.com/products/lead-validation-verification-solutions/lead-validation

SERVICE OBJECTS ALSO OFFERS FREE PRESENTATIONS AND DEMO BATCHES. PLEASE CALL 800.694.6269 OR EMAIL INFO@SERVICEOBJECTS.COM FOR MORE INFORMATION.