paperbot

Calling & Lead Management Platform

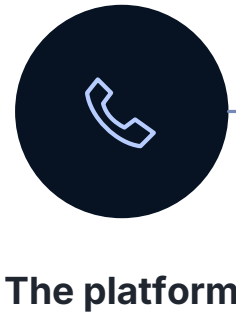
Your leads. Your conversations.
One dedicated platform.



A standalone calling platform with lead management built in. Bring the people you want to reach and the conversations that move them forward into one focused working environment.

A dedicated place for the next conversation.

Calling & Lead Management Platform brings calling and lead management together in one standalone environment. Your team can manage leads, make contact and decide how to continue each conversation.



The platform

Lead management, included

Manage leads within the platform your team uses for its calling workflow.

A dedicated calling environment

Work from a standalone system built around the conversations your business needs to make.

Optional conversation review

Optional transcription, translation and AI call evaluation support recorded-call review.

Lead context and calling belong together. The standalone platform brings both into the same working environment.

The lead belongs with the conversation.

Lead management is built into the platform. It gives your team a place to manage the leads behind its conversations within the dedicated calling environment.



A focused lead workspace

Bring lead management into the same platform used for calling. Your team can approach its contacts and conversations as connected parts of the work, with the lead providing the starting point for each discussion.

Context before contact

Start with the lead you intend to reach and review the context available to your team. A considered conversation begins with understanding who you are contacting and what you need to discuss.

Start with context.
Make the conversation count.

A call is part of a relationship with a lead. The platform brings the lead-management environment and the calling workflow together, helping your team approach each conversation with a clear purpose.



Prepare for the discussion

Review the lead and the information your team needs before making contact. Establish the purpose of the call so the conversation begins with relevant questions and a clear direction.

Keep the next step in view

Use the conversation to understand what the lead needs next. That may be a further discussion, an answer to a question or a decision about how your team should follow up.

Your calling platform. Your choice of PBX.

Choose Paperbot PBX or connect a compatible third-party PBX. Paperbot PBX is our recommended option for easier management, integration and configuration, with a coordinated setup intended to support better calling performance.



Paperbot PBX, recommended

Bring the calling backend and platform configuration into a setup our team can coordinate together. Paperbot PBX is the recommended route for a more closely aligned calling environment.

A compatible third-party PBX

An external PBX can be considered where the required connection is supported. We review its interfaces, access requirements and provider arrangements before agreeing the integration scope.

Give the next conversation a better starting point.

The work continues after the call. Use what you have learned to shape the next discussion and keep the lead's needs at the centre of the follow-up.



Respond to what matters

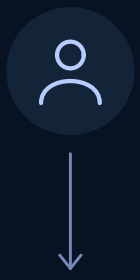
A conversation may reveal a question to resolve, an interest to explore or a reason to speak again. Let that understanding inform the response your team chooses, rather than treating each call as an isolated activity.

Review where it helps

Optional transcription, translation and AI evaluation can support a closer review of recorded calls before your team decides the next action.

A clear flow.
From lead to next step.

Keep the everyday calling process focused: understand the lead, have the conversation, review where useful and decide how to continue.



Begin with the lead

Identify the lead and review the context available in your platform.

Make the call

Use the dedicated calling environment for the intended conversation.

Review the discussion

Use the optional conversation-review tools when enabled for your setup.

Choose the next action

Decide the appropriate response or follow-up with the lead's needs in view.

Extend the conversation. With the right review tools.

Extend the platform with optional transcription, translation and AI call evaluation. Each service has its own dedicated brochure.



Call Transcription & Translation

Create written transcripts and translate transcripts or recorded audio into supported languages.

AI Call Evaluation System

Use AI-generated call scores to support your team's review of recorded conversations.

Built around the way your team calls.

The right setup starts with understanding your team's calling workflow and lead-management needs. We bring those requirements together before defining the platform configuration.



Your working requirements

Explain who will use the platform, how leads are managed and the calling arrangement your business needs. Share any existing systems or provider arrangements that should be considered.

The agreed platform setup

Confirm the lead-management workflow, calling connection and any optional review tools required. Language availability, recording access and integration details are agreed for the selected scope.

Bring your leads and conversations together.

A dedicated platform for calling and lead management, with optional review tools shaped around your team's needs.

Let's shape your calling environment

Tell us how your team manages leads and conversations. We will define a standalone platform setup that brings the right calling connection and optional tools together.

Connect with Paperbot

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Handcrafted for your business.