

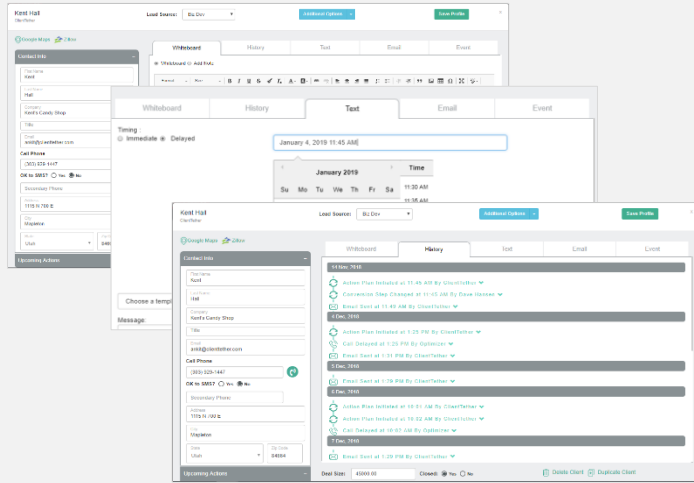
ClientTether 2.5

Product Overview



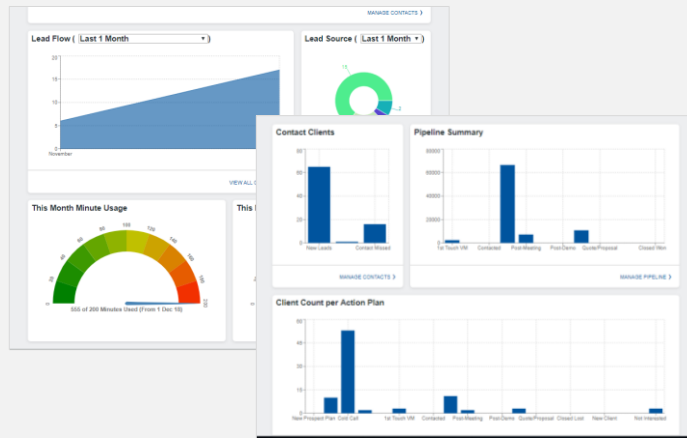
What's New in Version 2.5?

Completely New Client UI



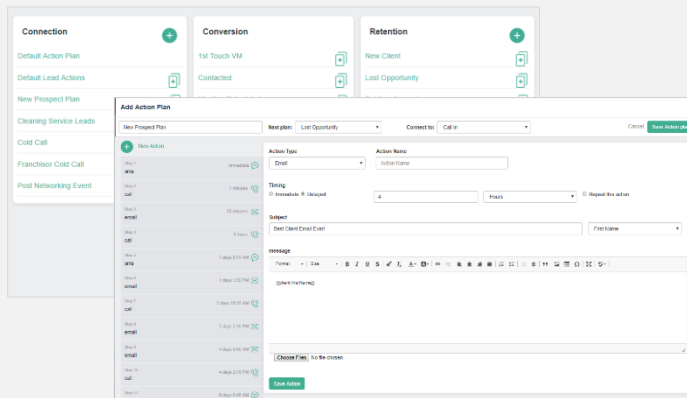
- Quick access to history, whiteboard, emails, texts, and event scheduling
- At-A-Glance history view with clear iconography
- One-click Next Action view
- Simple email, call, call reminder, and SMS scheduling wizard

Dynamic Dashboards



- New snapshots of Incoming leads, overdue tasks, calls today, and pipeline summary
- Improved and dynamic lead source and lead flow data
- Improved utilization data

Updated Action Plan UI



- All-In-One Action Plan viewer and task editor
- Improved scheduler tool
- Simplified Action Plan connection tool
- Easy Lead Source connection into each plan

For more information about ClientTether's Client Engagement Platform, please visit www.clienttether.com

