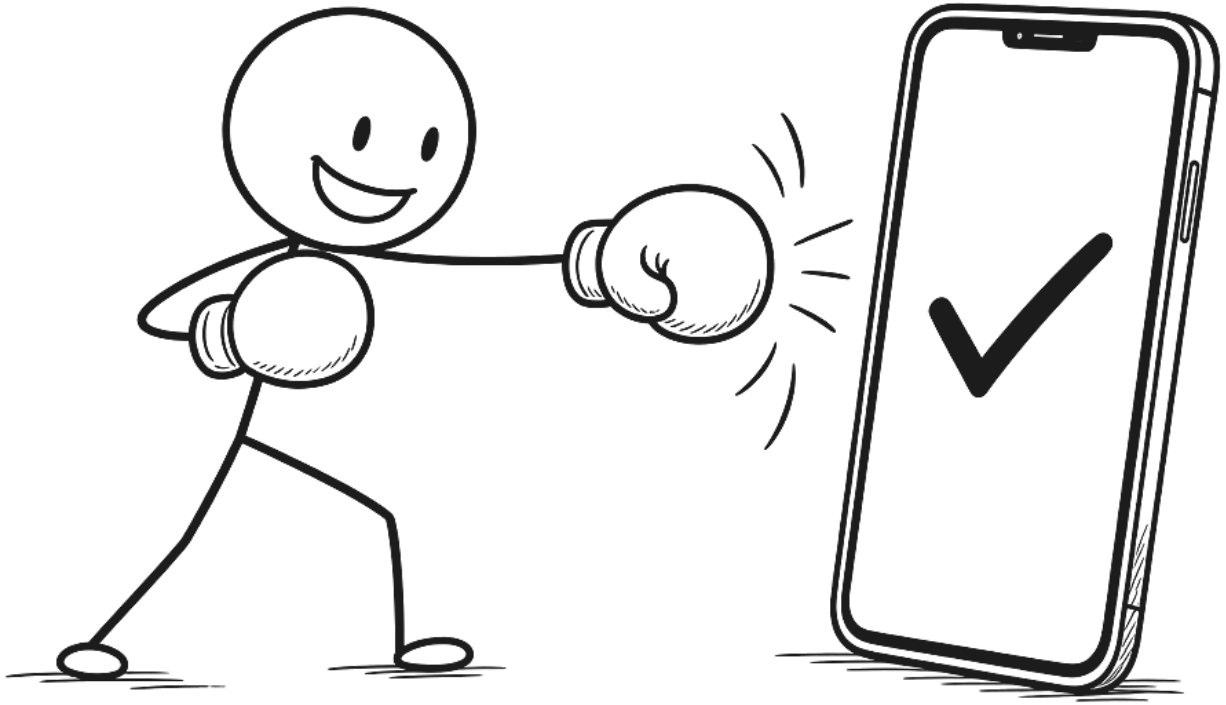
MASTERCLASS 002 | PHONE VALIDATION

The 1-2 Punch for **Phone Verified Leads**

In-field validation and OTP, and why I use both.



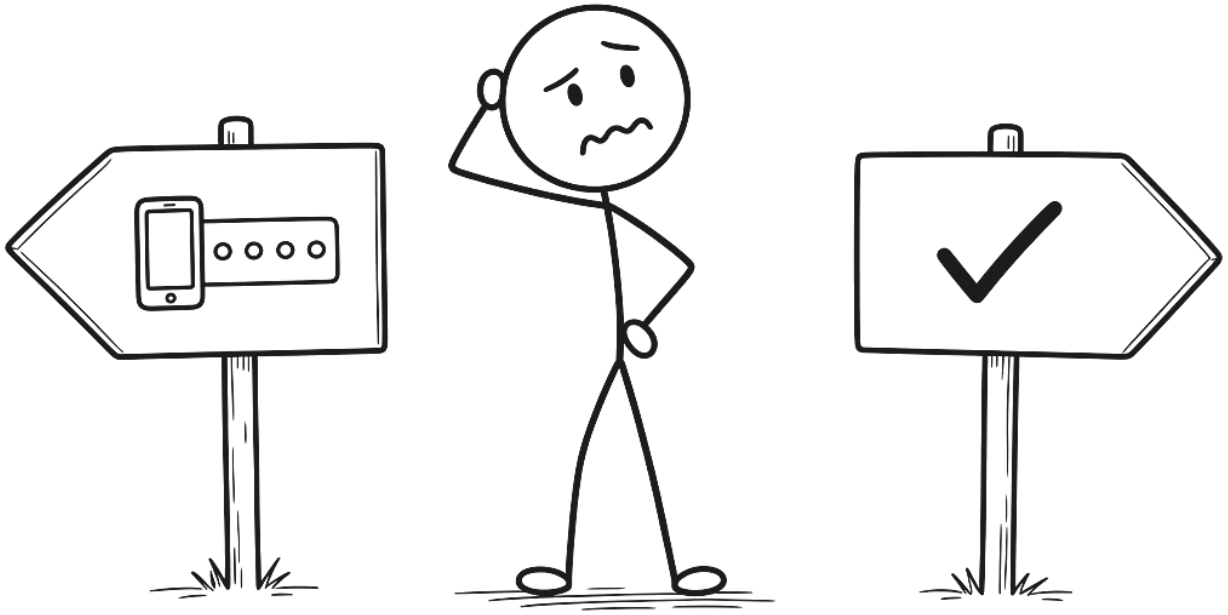
one, two

THE QUESTION

OTP pin code, or **validate in the field?**

The question I get all the time.

Here's a different take on verifying phone numbers.



which way?

WHY VERIFY

Qualified leads **are the business**

Whether you sell leads, run an agency or generate your own.

Every business needs leads. What they really need is qualified leads.



WHY VERIFY

Weed out **bad numbers**

One of the easiest ways to get qualified leads.

Nothing is worse than calling dead numbers.

Bad numbers burn trust with your buyers and clients.



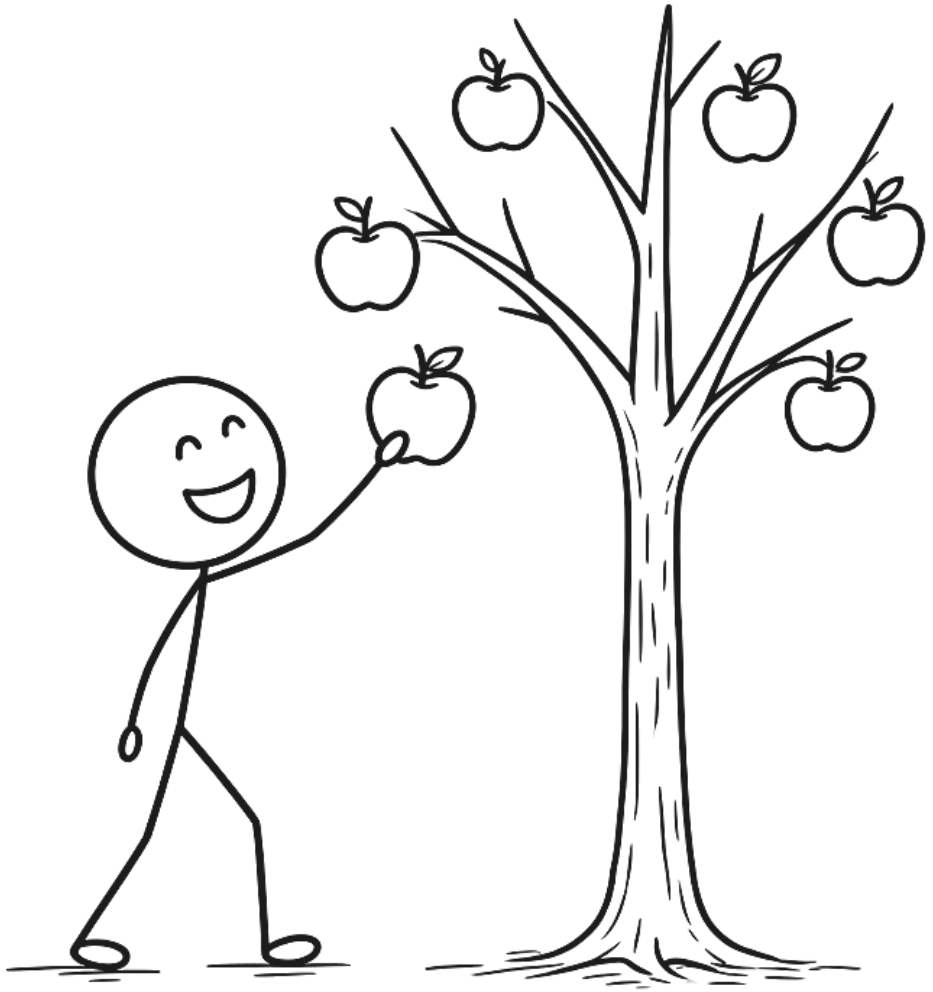
THE MINDSET SHIFT

Quality is the **new default**

Before 2019, I had to educate people on validating in the form.

In 2026, most people come to LeadCapture assuming we have it.

Teams stopped racing to the bottom. This is low hanging fruit.

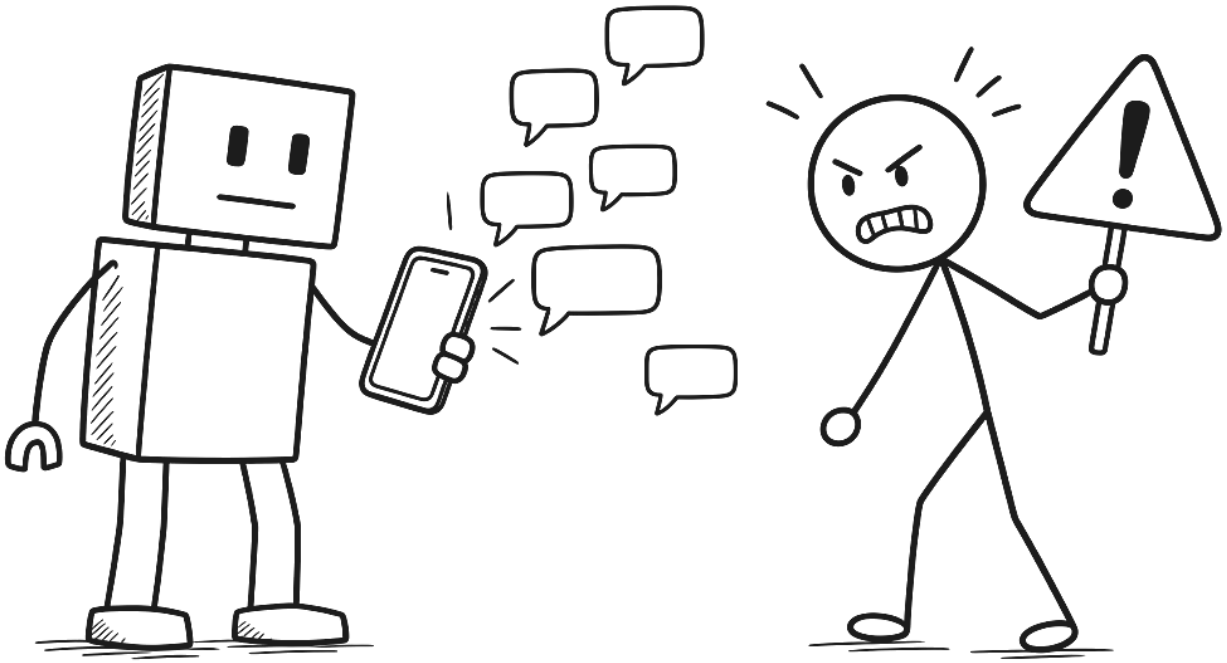


lowest hanging fruit

WHY IT MATTERS MORE NOW

AI calling and SMS **raise the stakes**

1. Deliverability: dead numbers hurt it.
2. Compliance: a TCPA risk.
3. Validate before the lead goes downstream.



THE REAL QUESTION

How do you validate **a phone number?**

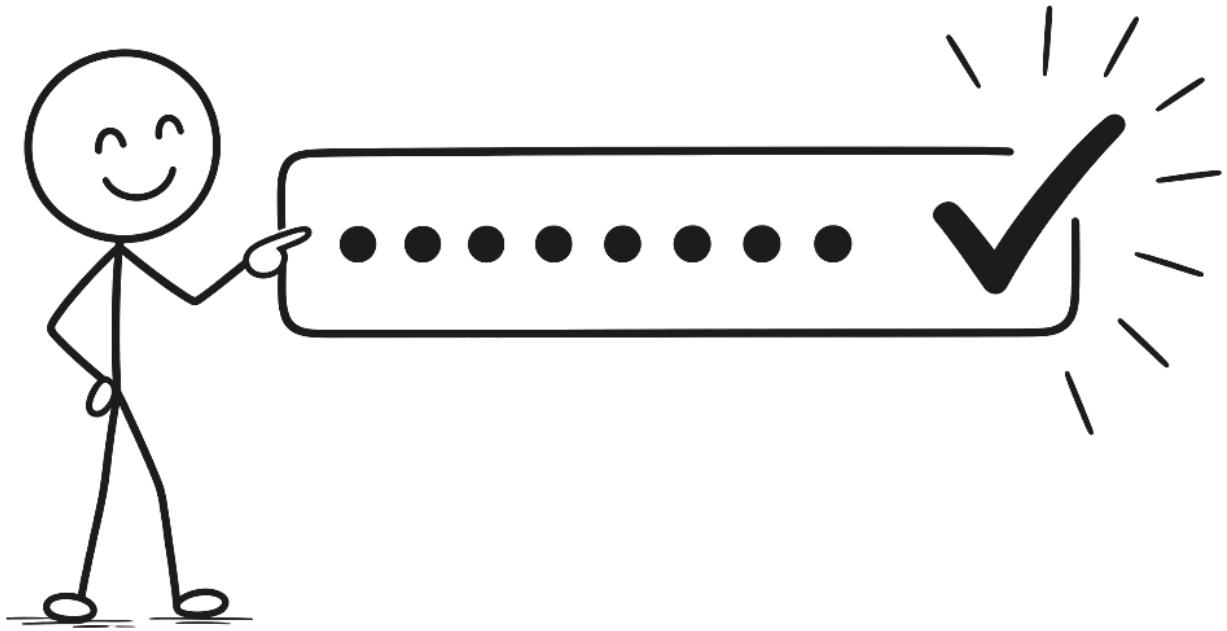


Two things to check

1. Is the number valid and accurate?
2. Is a real person who submitted the form holding the phone?

STRATEGY 1

The line check **in the phone field**



Validates the information about the number.

Run it downstream in your CRM or distribution tool, or right in the field with feedback to the person typing.

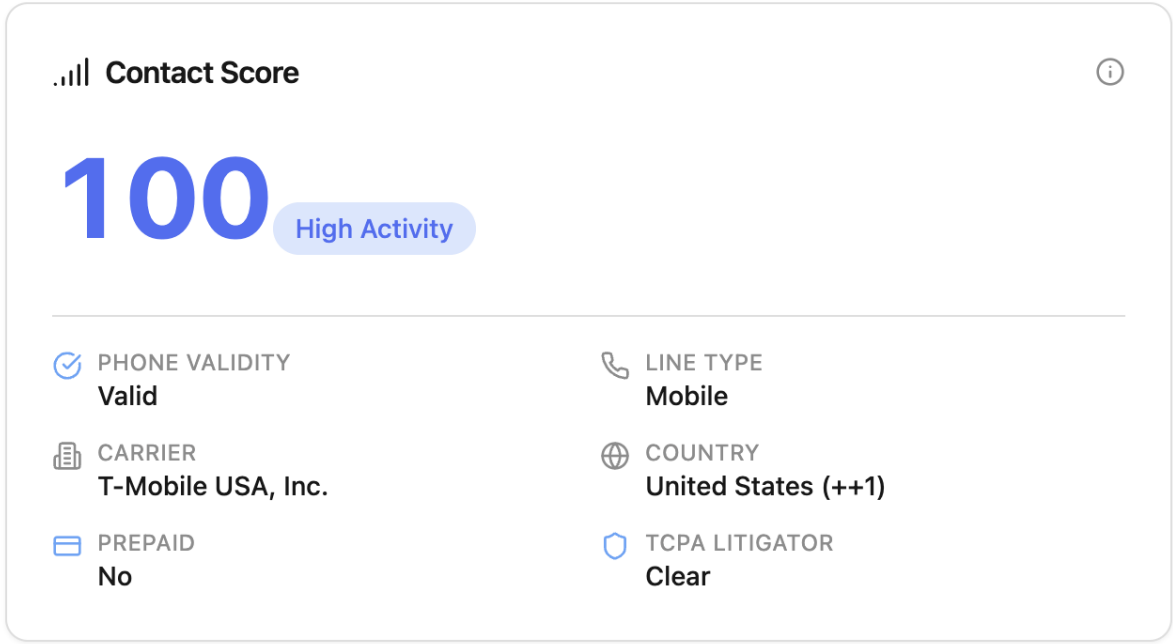
STRATEGY 1

What to look for

Line type: landline, VoIP, mobile or prepaid.

Valid or not, activity score, carrier, region, TCPA check.

Then segment leads by it to optimize contact rates.



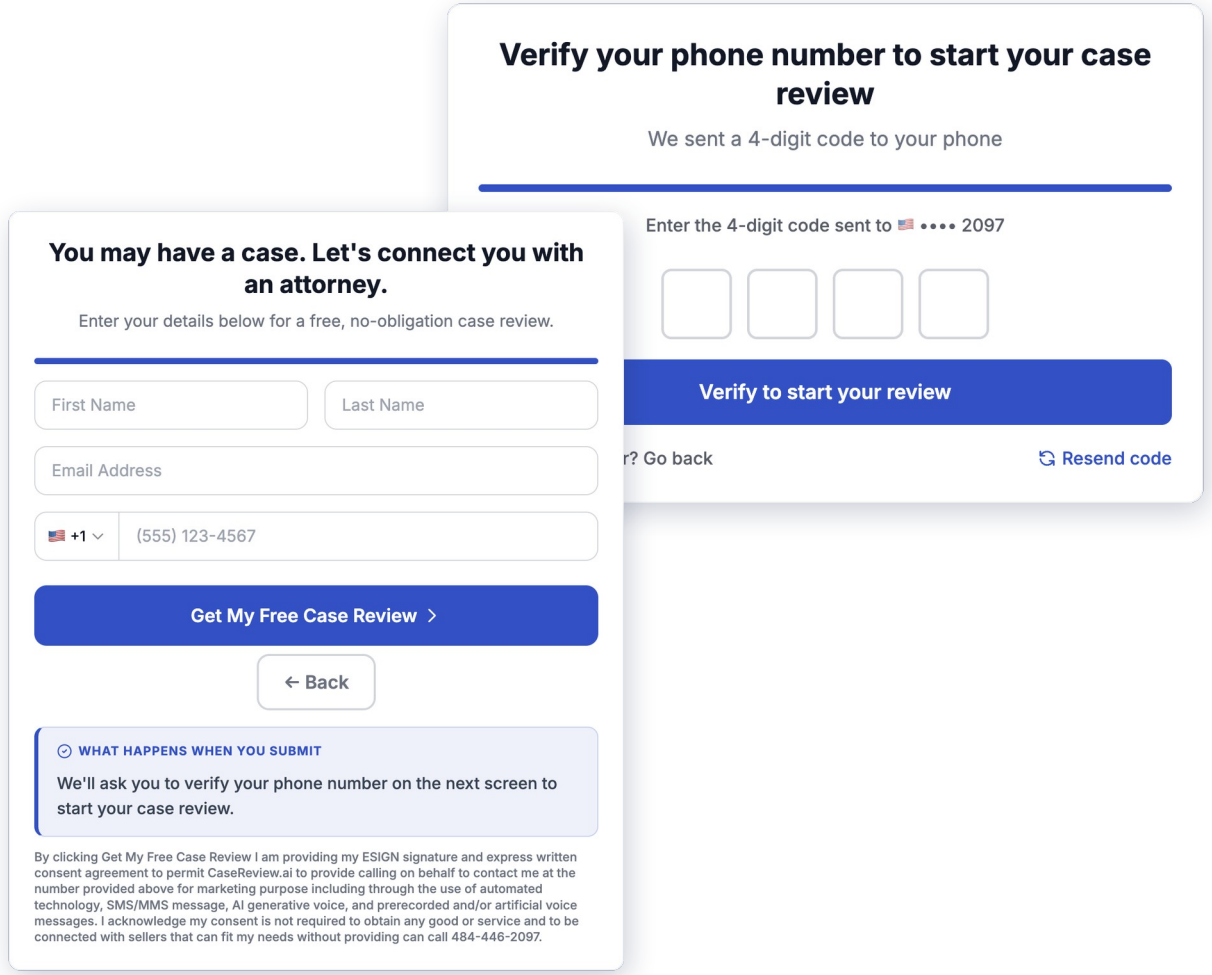
This is a lead generated within LeadCapture with all the validations.

STRATEGY 2

The two-factor **OTP pin code**

Anyone can type any number, and it can pass a line check.

OTP tells you the person is holding the phone.



1. contact, then 2. pin

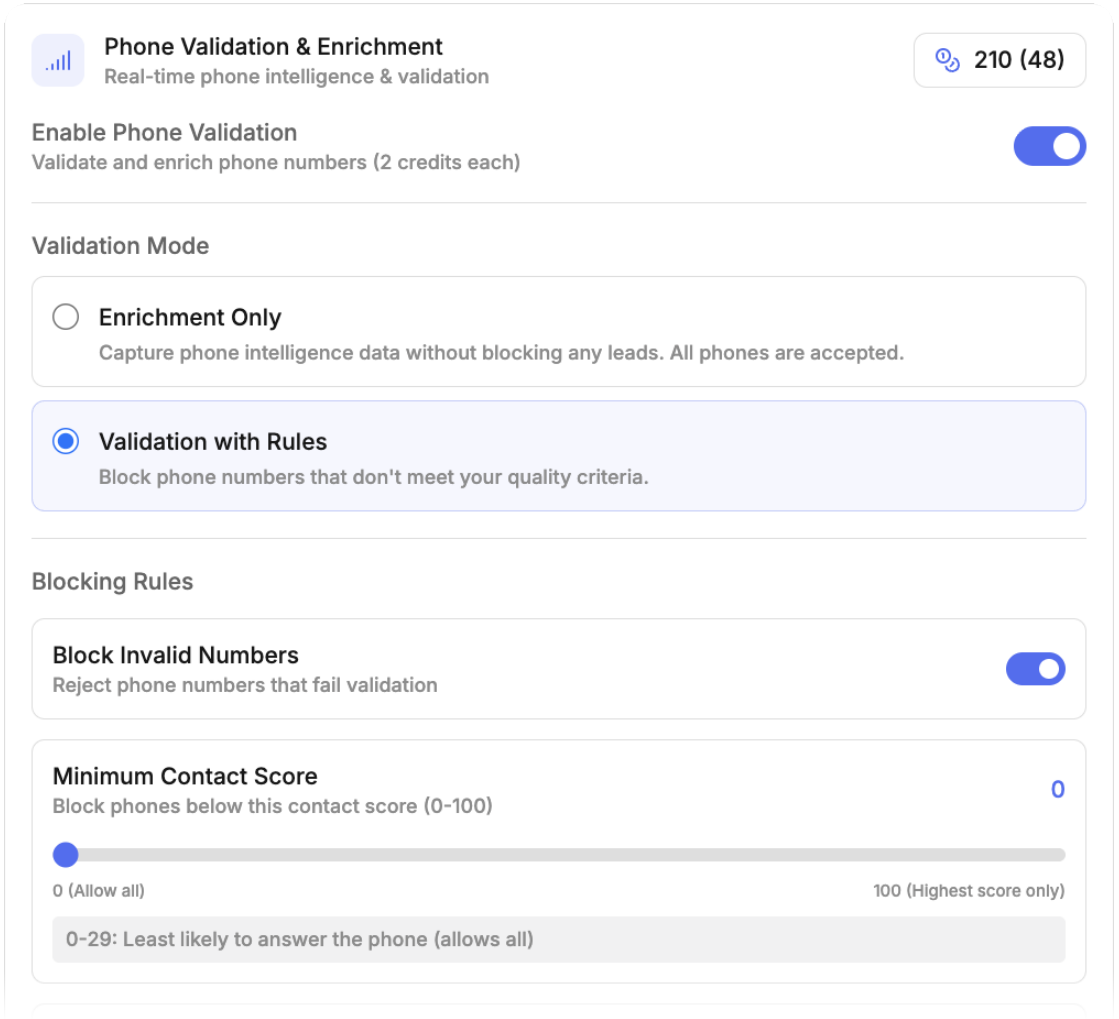
IN LEADCAPTURE

Phone validation: **flip a switch**

Pick which values to enrich the lead with.

The contact score lands on the lead record. Pass it downstream or block on it.

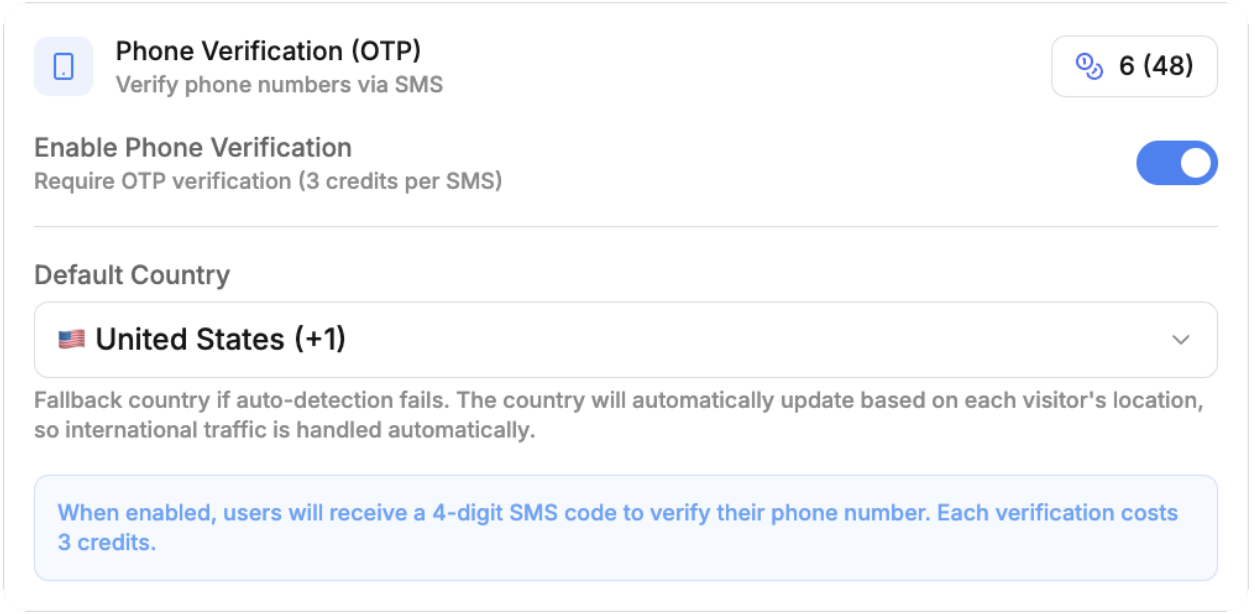
My tip: turn on basic validation to weed out invalid numbers. Then collect data first and fine-tune what you block on.



IN LEADCAPTURE

OTP is **also a switch**

Turn it on, and edit the OTP step text.



QUESTION 1

Will OTP kill my **conversion rate?**



We've sent millions of phone validation requests.

About 12% drop-off is normal. 30% is the high end.

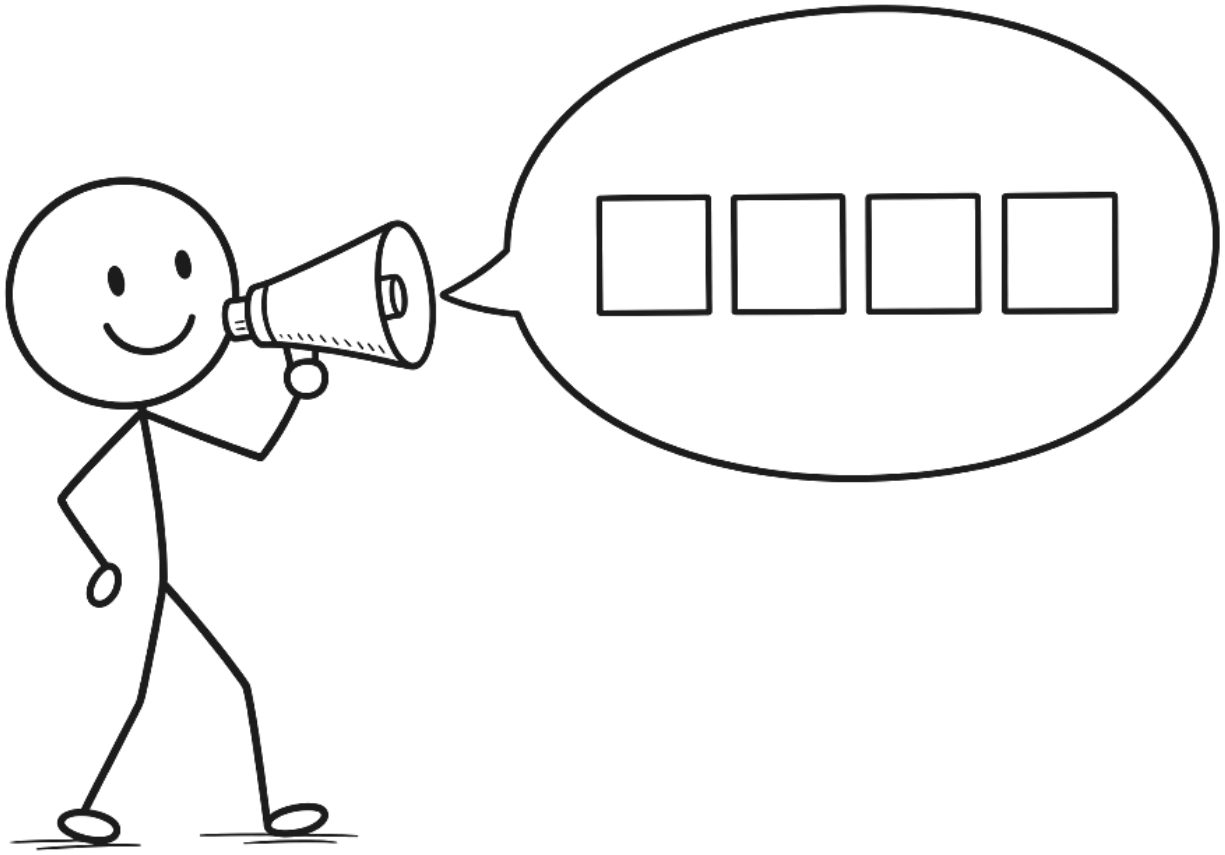
At 20 to 30%, something needs optimizing.

LOWER YOUR DROP-OFF

Tell them a **pin code is coming**

Say what happens on the pin code step, including in the CTA.

I've seen people cut drop-off in half just by being clear.



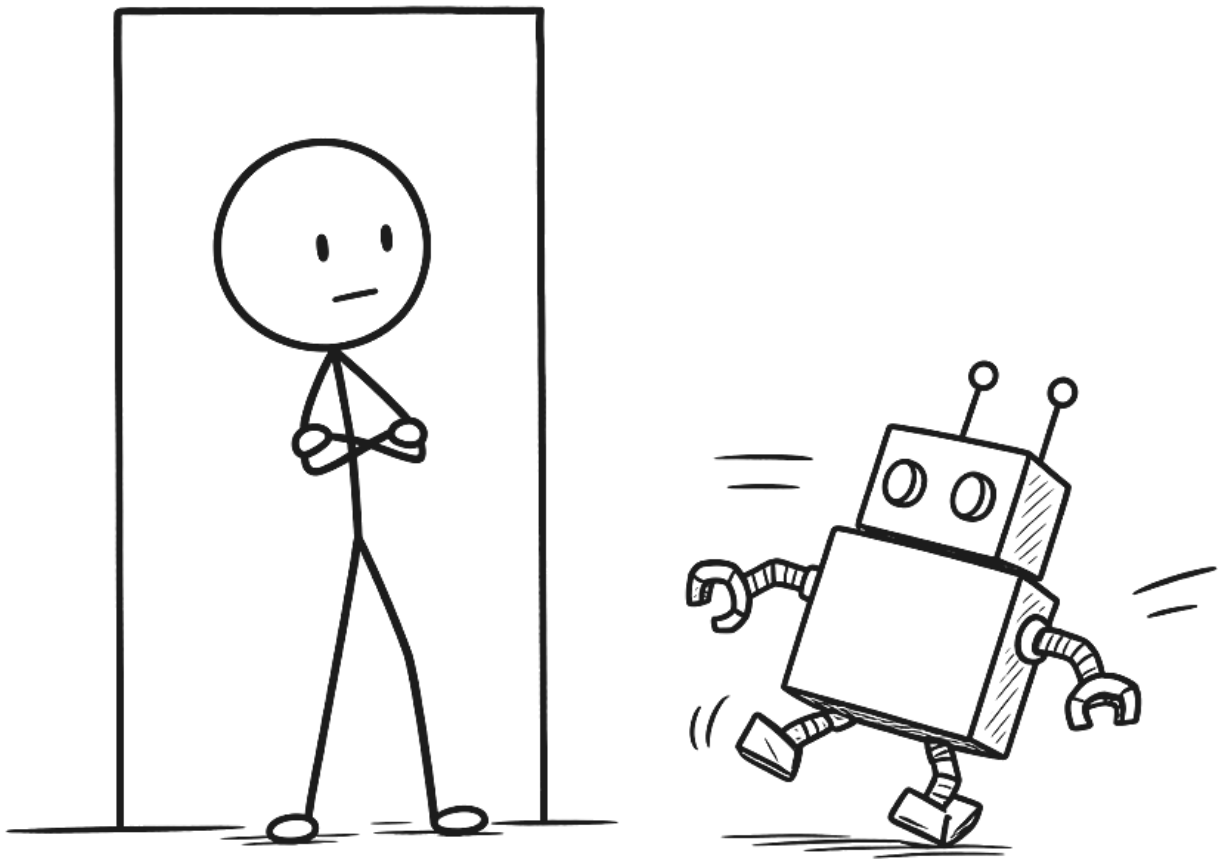
just be clear

MINDSET SHIFT

A good thing?
Not all drop-off is bad.

Some of it filters out low-intent, unqualified leads.

It also filters out bots and spammers. Not a silver bullet, but it helps.



not tonight, bot

QUESTION 2

"My audience is older. **They won't do OTP."**

Comes up a lot in insurance, final expense and annuities.

OTP can go to a landline as a voice call.

Most seniors now have cell phones, many with a landline too.

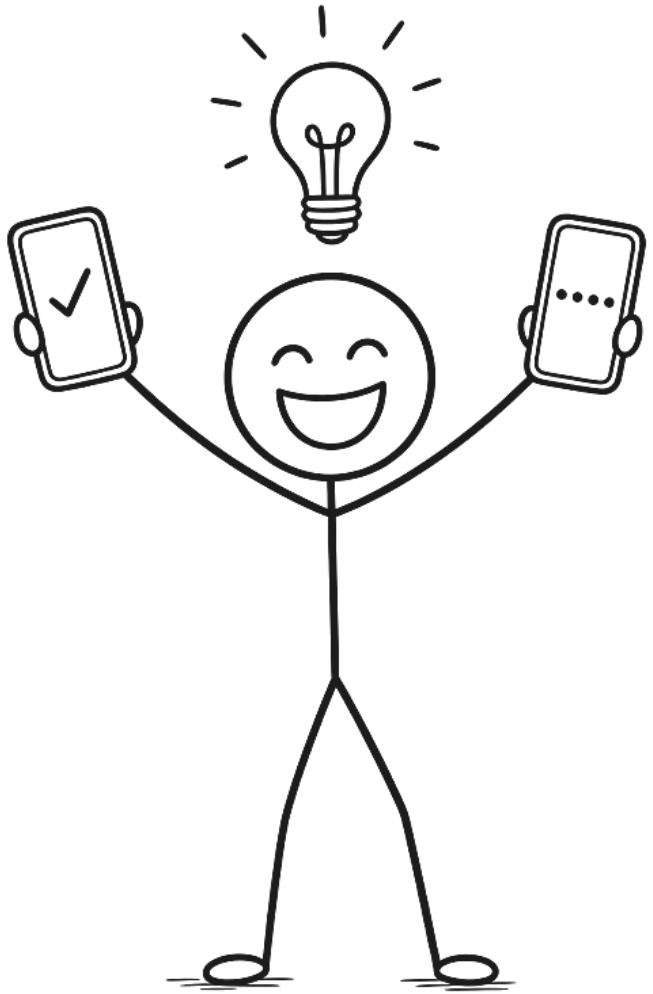


THE AHA

Not one or **the other. Both.**

Should I do OTP, or just validate in the field?

My answer is both.

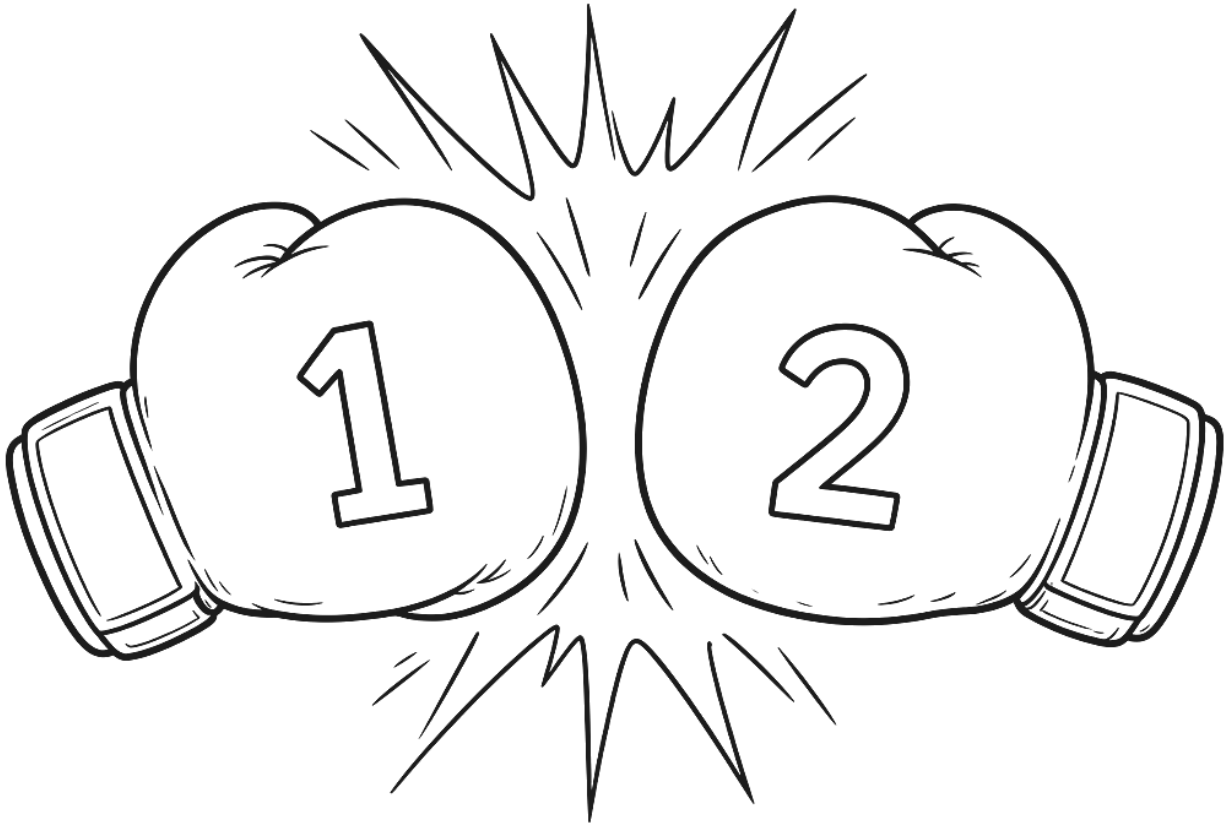


THE 1-2 PUNCH

Two punches, **two questions**

Punch 1, in-field validation: is the line valid, and how likely is this person to pick up?

Punch 2, OTP: does the lead have intent, and are they holding their phone?



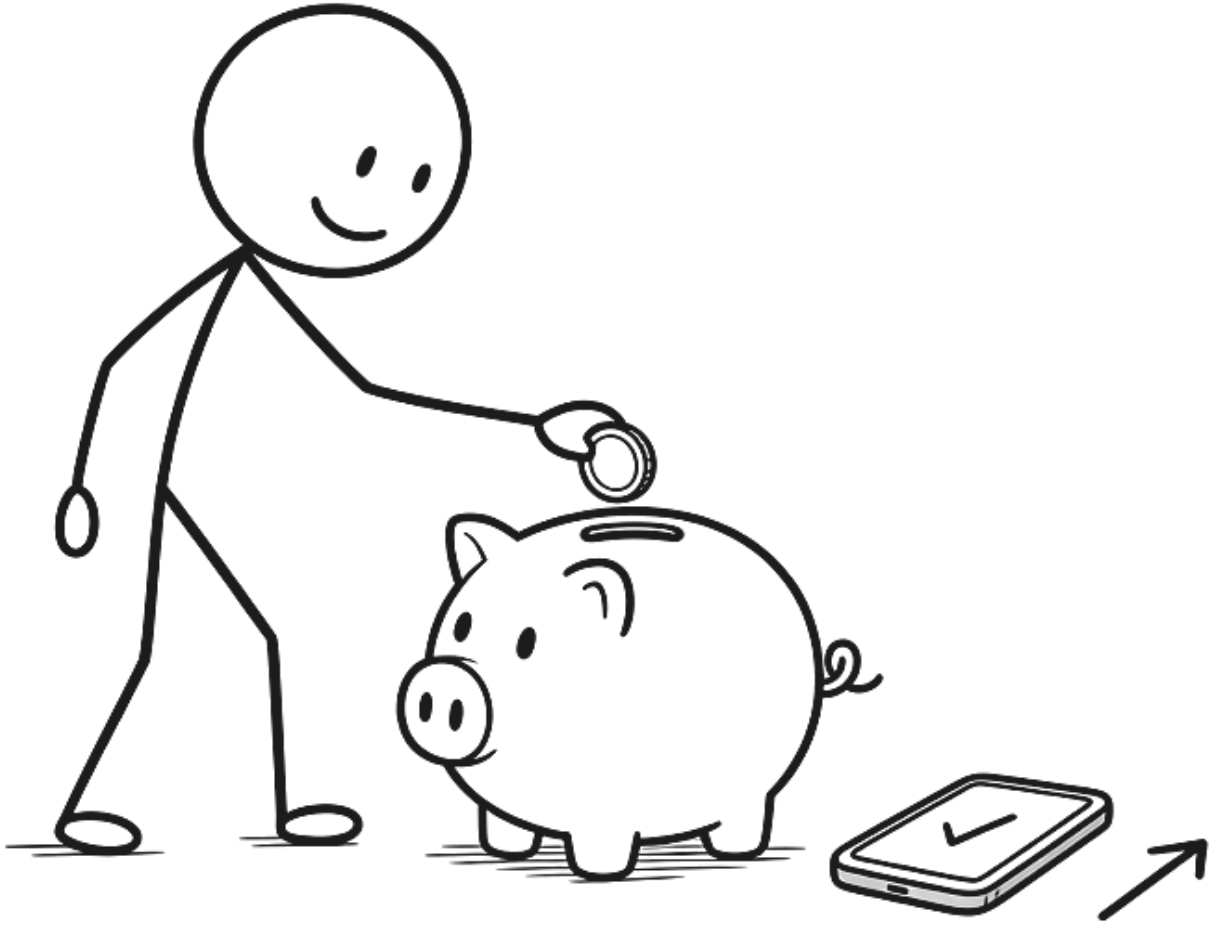
BENEFITS OF BOTH

Lower costs, **better leads**

OTP costs more to run, and spam drives costs up.

Validate first. Skip codes to prepaid, landline or VoIP numbers.

Better contact rates and intent on the leads that get through.

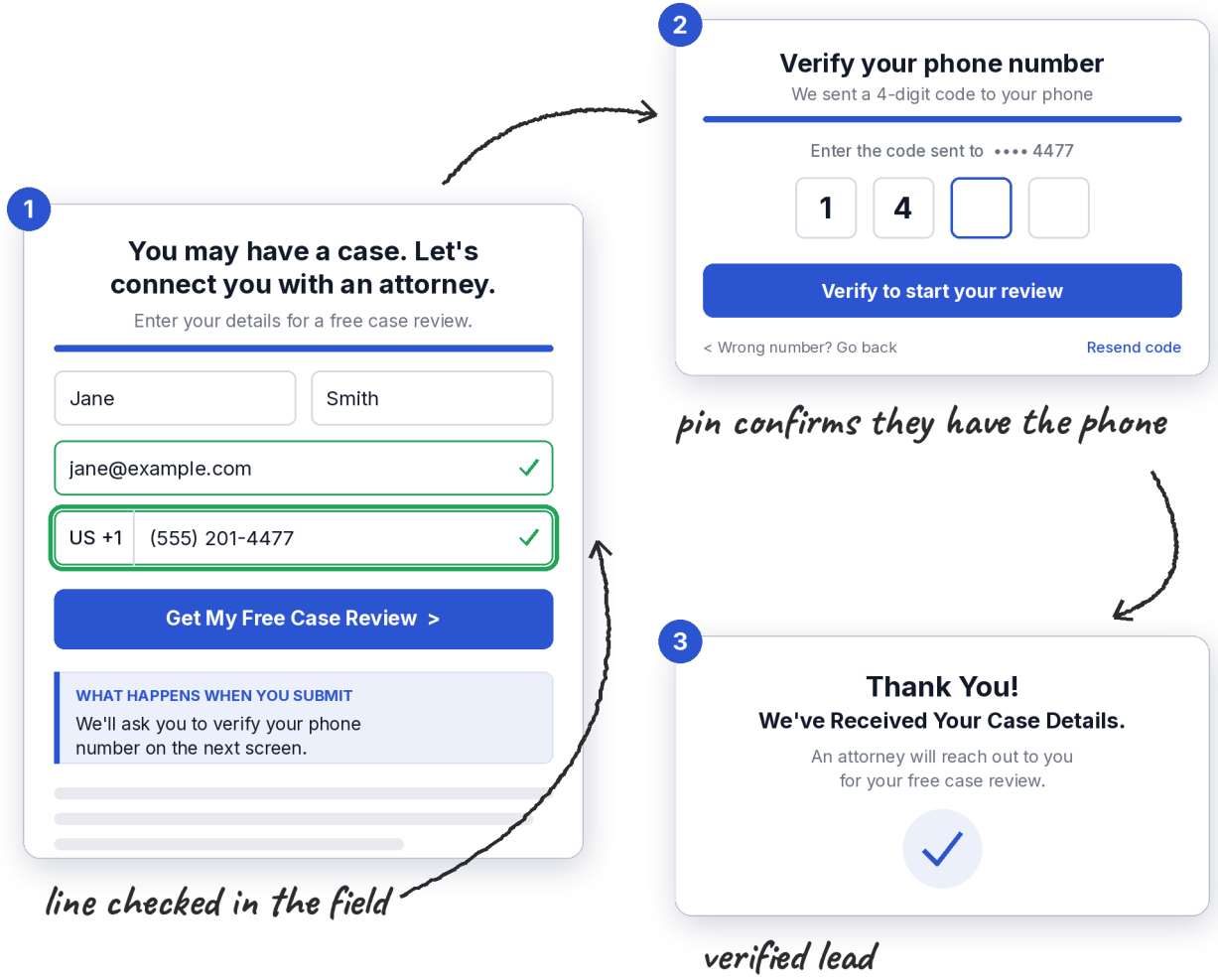


IN PRACTICE

What this looks like

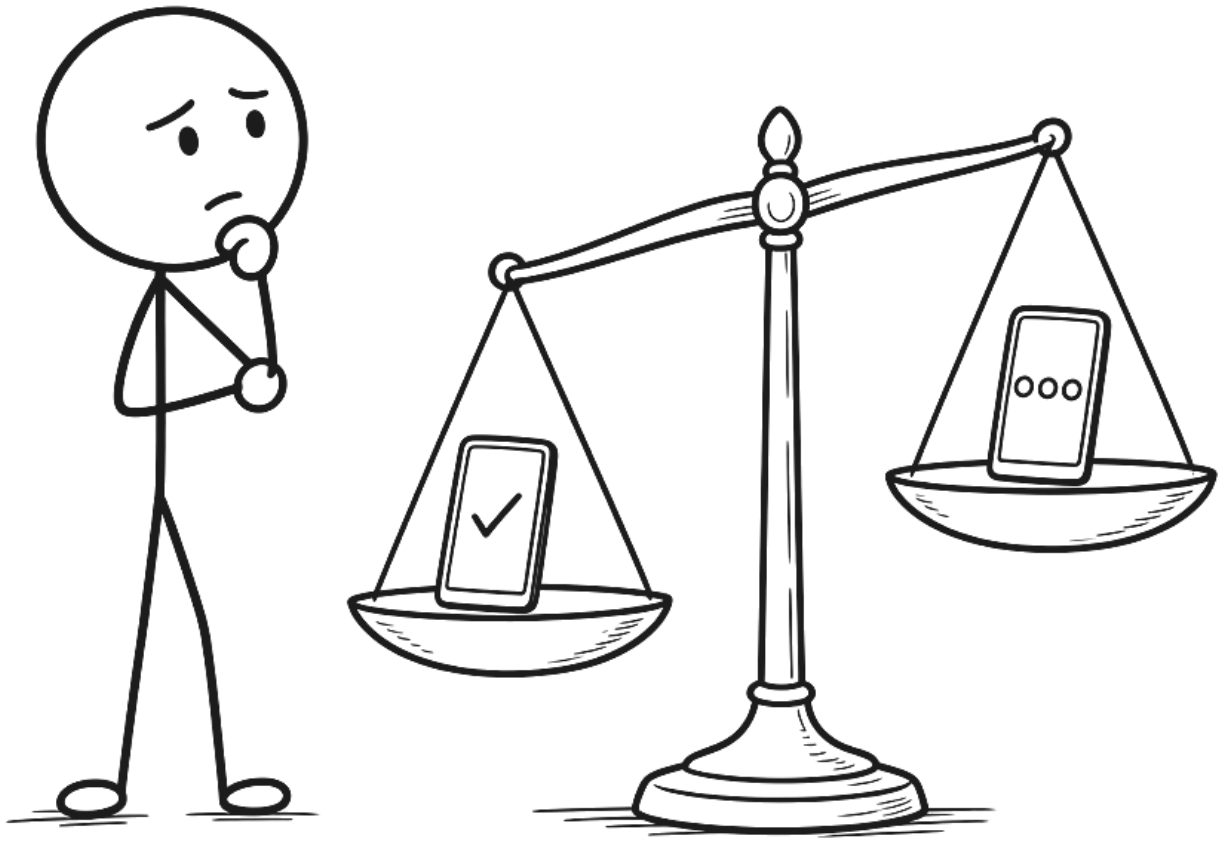
An example form walkthrough.

This assumes you even want to use OTP.



IF YOU HAD TO PICK ONE

It depends.
I lean in-field.



It depends on your situation and the leads you're generating.

Struggling with contact rates or spam? I'm 100% switching to OTP.

I've seen businesses build very successful operations on OTP.

THAT'S THE SETUP

Questions?
Reach out.

That's the setup.

If you have questions, reach out.



talk soon

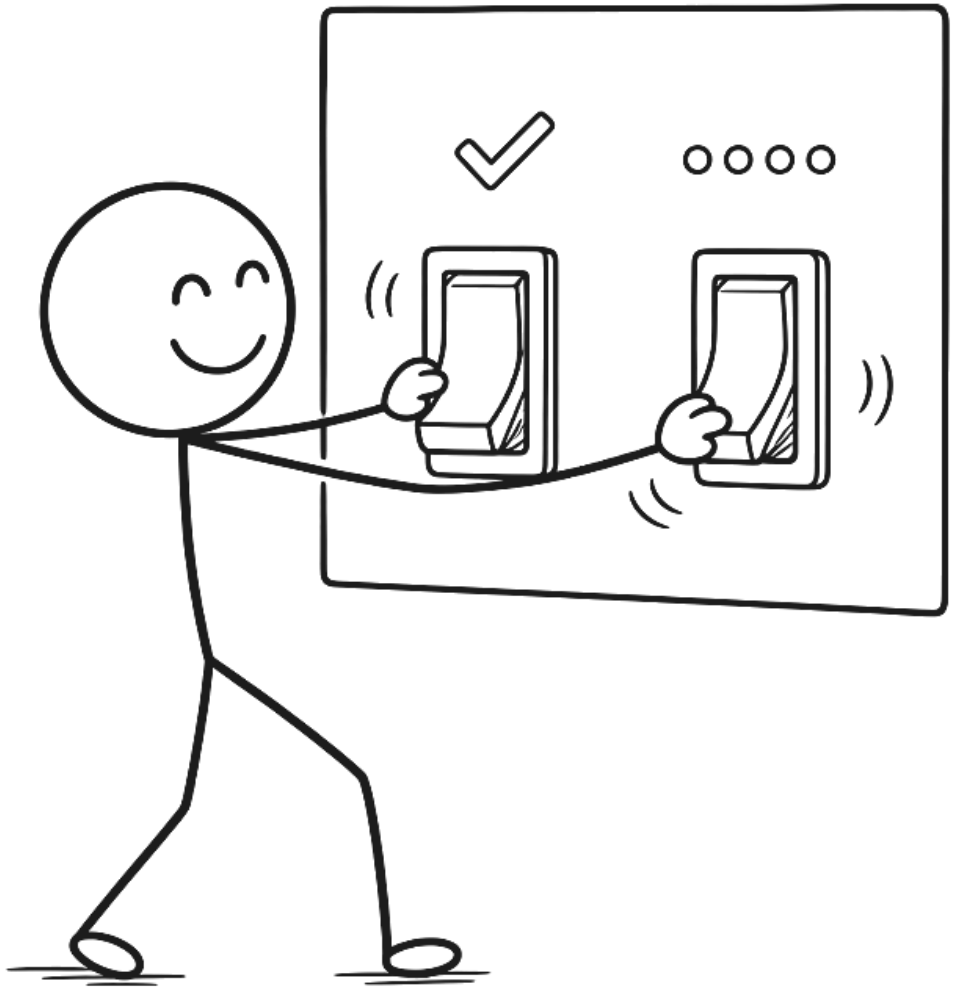
LEADCAPTURE

Both punches, **built in.**

In-field phone validation and the contact score on every lead: a switch.

OTP pin code verification: also a switch, with step text you can edit.

Try it at leadcapture.io



flip both switches