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“Our age of anxiety is, in great part, the result of trying to do today’s jobs with yesterday’s tools.”

— Marshall McLuhan

EXECUTrax

Are you still passing around leads on 3 part forms? Are you manually filling in client profiles that aren't being shared, or that are stuck in a folder in a desk, never to be seen? Maybe you are still using excel to recap and pay incentives? A simple sales tool has arrived that can not only automate your referrals, but also track your incentives and share valuable client intelligence enterprise-wide. Make it easy for your front-line staff to do their job – and to achieve the sales results you expect.

What makes ExecuTrax unique?

- **MCIF Drives CRM Intel.** Success with CRM requires accurate client Intel. This is why we wrap our CRM tools around a nightly updated MCIF. Arm your front-line staff with client information they can trust to be both accurate and timely.
- **Easy to Use.** Looking for client Intel? Click! Wish to send a referral? Click! Connecting to Outlook? Click! This is a CRM tool that everyone on your staff will embrace to send, receive, and track referrals.
- **Complete.** All of the tools you need to move away from a manual referral process to a completely automated program are included, standard. Add to this an MCIF that updates your client data nightly, and you have an overwhelming value.
- **Affordable.** Why pay 2-3 times more for a CRM solution that doesn't include the power of an MCIF or have data you can trust? It doesn't have to cost an arm or a leg to get the power you need to get real ROI from CRM.

KEY BENEFITS

- *A CRM solution that makes it easy for your staff to get results.*
- *CRM platform has a built-in MCIF.*
- *Send, receive, and track referrals, instantly.*
- *View current incentives, calculations, and send them to your payroll system.*
- *Build a custom profile for each relationship that outlines their future needs and captures unique relationship knowledge.*
- *See the full relationship for every client, all the products they have, and even what they are likely to buy next.*
- *Share client profitability and key demographic information.*
- *Schedule your next contact and sync it with Outlook or other e-mail services.*
- *Easy migration path to full CRM, with our CallTrax solution.*
- *3-days of on-site training is included along with tutorials, to satisfy your training needs.*

“It is not the strongest of the species that survives, nor the most intelligent, but the one most responsive to change.”

— Charles Darwin



We assure your success with CRM technology by delivering a solution that is easy, complete, and affordable. Secrets from past CRM installations place a high value on your staff having data they can trust, and in having a solution that is easy for everyone to use. CallTrax delivers on both, and is proven with financial institutions!

What makes CallTrax unique?

- **MCIF Drives CRM Intel.** Success with CRM requires accurate client Intel. This is why we wrap our CRM tools around an MCIF that updates your client data each night. We make certain that your front line staff has both the current and precise information they need for every client.
- **Easy to use.** Your front-line staff will embrace using this solution. They will have easy access to client Intel, referrals management, pipeline reports, contact management and more...using a distinctive interface. Your success with CRM will improve dramatically when your team adopts their tool quickly and sees it as a natural extension of their work.
- **Complete.** Every CRM feature and function that you can imagine is included standard. With over 100 installations of our CRM tools, we have proven that our solutions deliver results. Unlike others, this CRM solution comes all in one. No modules, no extra fees.
- **Affordable.** Every institution wants ROI from CRM. This is a great deal easier to accomplish if the investment (upfront and ongoing) is affordable. When you consider that this solution includes both an MCIF and the CRM tool in one - along with on-site training and consulting - this is an exceptional value

KEY BENEFITS

All the benefits outlined in ExecuTrax, plus...

- *View and track your current goals and incentives and send to your payroll system.*
- *Automate call scheduling for staff follow-up.*
- *Log each client contact, so that your entire team is aware of issues and opportunities.*
- *Build custom Profiles for each relationship.*
- *Connect with your Teller Platform. Have it automatically call and populate our CRM tool during client contact.*
- *Manage your sales pipeline and track success.*
- *Call Center and affiliates can also use this unified CRM platform.*
- *Schedule your next contact and sync it with Outlook or other e-mail services.*
- *A CRM solution that makes it easy for your staff to get results.*

Marketing Solutions

MCIF Software
MCIF Services
Onboarding/Matrix Mail
Retention
Loan/Deposit Growth
Strategic Marketing Consulting
Creative Agency
Direct Mail Fulfillment

Sales/CRM Solutions

Referral Tracking
Comprehensive CRM Software
Cross-selling
Sales Consulting
Pipeline Management
Goal & Incentive Tracking
Contact Management
Real-Time Solutions

Compliance Solutions

CRA, HMDA & Fair Lending Software
CRA & HMDA Services
CRA Solutions
HMDA Solutions
Fair Lending Solutions
Community Development Tracking
HMDA LAR & CRA LR Submissions
Compliance Consulting
CRA Exam Management
File Reviews
Fair Lending Process & Risk Assessment
Comparative File Review
Data Integrity Audit

MARQUIS