



# CALLTRAX NEXT

## A New Generation of CRM Software

### Looking for CRM technology?

**CALLTRAX NEXT** is the CRM system designed exclusively for financial institutions. A key to CRM success begins with assembling all the disparate systems into one database. **EXECUTRAX**, our analytical database, assembles all your customer and household information for **CALLTRAX**; keeping Sales and Marketing on the same page.

### Role-Based access

Create any number of roles with defined permissions to accommodate everyone and maintain control. From read-only to unlimited access, you set the security levels and manage what is viewed.

### Dashboards

Each role can also have access to the powerful dashboard and reporting tool. Management gains insight to sales and trends at every level from individual branch staff to the entire institution.

### 360-View of Relationship

A single source for all your customer relationships, from the frontline to the call center, everyone can view the calls, campaigns and conversations.

### Incentive and Pipeline Tracking

Track and manage your sales pipeline, referrals, and internal incentive plans in a single location. Whether you're incentivizing markets, branches, or product lines, **CALLTRAX** gives you the power to administer a results-based incentive plan.

To learn more about Marquis Marketing services, or to receive a demo of our products, contact us at [sales@gomarquis.com](mailto:sales@gomarquis.com).

**Data is updated daily so the front-line always acts with the best possible information. This increases customer retention and satisfaction.**

**EXECUTRAX**

**CALLTRAX**

**DOCUMATIX**

**ONTRAX**

See What's **NEXT**.

**MARQUIS**