

CALLTRAX - CRM SOFTWARE

CallTrax will help you manage and monitor your formal Sales & Service CRM initiatives. If you are looking for comprehensive CRM technology with the benefits of sales force automation, then CallTrax is the right tool for you. CallTrax comes with the power of our daily updated analytical tool – ExecuTrax – so your staff can count on current and accurate data and you can count the results.

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ASSEMBLY

- Daily updates. Included in our software is the ability to update your data daily. No more waiting 30-45 days to analyze your data only to have it be outdated the very next day. Your recommendations are always current. Your analysis is always on point.
- One database. We combine data from any source, including your core, credit card, mortgage, investment, insurance, demographic, psychograph and predictive models. You can create a robust database ready to be analyzed by individual and rooftop.
- Rich 360-degree data. Knowing what an individual is purchasing from you is only half of the picture. We can further enhance your data with demographics, psychographics and predictive models.

ANALYSIS

- Build loyalty. CallTrax identifies individuals who are critical to the profitability of your firm as well as those who need an extra push to increase their engagement. By planning sales efforts around these two groups, you will increase loyalty and decrease attrition.
- Know the customer. At the heart of any CRM initiative is learning more about the customer's needs and wants. CallTrax is designed to build actionable profiles geared toward strengthening and deepening customer relationships.

ACTION

- Pipeline management. CallTrax gives you the power to know your numbers. Your sales team can provide their sales projections using real-time CRM, which links directly to a 360° client view, a log of every client contact, and client profile information, giving you control over expectations and planning.
- Incentive planning. Plan, implement and track a meaningful and fair incentive plan at any level of the organization. Whether you're incentivizing markets, branches or product lines, CallTrax gives you the power to administer a results-based incentive plan.
- Referral tracking. A key component of CRM is referral tracking. CallTrax makes this process easy by automating the referral process. This makes handing off leads easy for your staff and gives you the ability to ensure that each opportunity is being discovered, developed and closed.

OUR MISSION. To make it easier for you to assemble, organize and translate complex data, behaviors and needs into actionable solutions.

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