



CALLTRAX NEXT

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Why CRM?

Your financial institution interacts with people on many levels, and each interaction generates information about your customer or prospect.

In reality, it's harder than it sounds. A clear indication you need a CRM system is when:

- You don't have an accurate view of your customers' products and services
- You don't know or understand their current needs and are not able to anticipate their future needs
- You are losing relationships to a competitor

CRM is more than just technology, it is a strategic process to better understand and meet your customers' needs. An effective CRM strategy can increase revenues by:

- Offering a better integrated customer service and experience
- Providing services and products your customers want
- Cross selling products more effectively
- Helping sales staff close deals faster
- Retaining existing relationships and discovering new ones

Why Marquis CallTrax NEXT?

Welcome to CallTrax NEXT, the CRM system designed exclusively for financial institutions. At Marquis, we speak your language, and have built a CRM system with features and functionality designed around financial services practices, with terms that are recognizable and intuitive.

We Organize and Make Your Data Actionable

- Assemble data from your various systems into customers and households
- Enable your front-line to take action with trusted data

We Integrate Service, Sales and Marketing Automation

- Relevant, personal, and timely customer engagement through "to-be-done" tasks for front-line based on transaction activity
- Automated and triggered communications based on transaction activity

Why Marquis CallTrax NEXT?

We Take the Anxiety Out of Adoption

- Help identify, assess and understand your priorities for CRM
- Configure and design the system to enhance your service and sales processes
- Deliver turn-key system with full implementation, pilot roll-out, and results – at your pace

We Provide a Complete Training Package

- Train the trainer, administrator, and pilot group
 - Team of experts help you along the way
 - Suite of eLearning modules provided for current and future staff
- *Sales training, coaching, and sales process analysis available

We Help You Along the Way and Get You Up and Running

- Detailed step-by-step schedule and process
- CRM Playbook, Data Validation, and pilot group