CALLTRAX NEXT FAQs

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1. **What is a CRM?**
   CRM, or Client Relationship Management, is an enterprise-wide platform that allows you to gather valuable customer interactions across all channels. CRM provides a means to track and automate various sales and service tasks. Another way to look at CRM is it gives your staff the tools and information they need to understand and better serve your clients.

2. **Why CRM?**
   CRM allows you to improve service and customer experience, operational efficiency and drive new sales.

3. **Why CallTrax NEXT?**
   CallTrax NEXT was designed exclusively for financial institutions. The features and functions are designed around financial industry practices. Customization by role is designed for ease of use and security. We speak your language!

4. **How do I know if my financial institution needs a CRM?**
   If you don't have an accurate view of who your customers are and what their needs are, or will be, at any given stage in their lives, or you are losing customers to a competitor, that's a clear indication that you need a CRM system.

5. **Can we get information and data from all our various systems in CallTrax Next?**
   CallTrax NEXT begins by assembling data from your various systems, such as core, mortgage, credit and other products.

6. **Who uses CallTrax NEXT?**
   Everyone in the institution from CEO to front-line staff are able to have access at various levels depending on role and need. Role-based access allows you to define user permissions from read-only to unlimited access while maintaining security control.

7. **How does it work?**
   CallTrax NEXT is a browser-based software solution that runs on your intranet. Enhanced customer transaction data is updated nightly. Any customer interaction logged is captured in real-time and can be viewed by all staff.

8. **How does CallTrax NEXT align marketing, sales and front-line staff?**
Included with CallTrax NEXT is an industry-leading marketing automation program. This program monitors and triggers print and e-mail communications to customers every day, automatically. These personalized communications are visible to the front-line staff along with specific scripts or talking points. The front-line staff is always aware of what was sent so they can have a proactive conversation.

9. **Implementation, where do we begin?**
We begin by helping you identify, assess and understand your priorities for CRM. We configure and design the system to enhance your service and sales processes. You receive a turnkey system - not just 'do-it-yourself' software to figure out. We help take the anxiety out of adoption!

10. **Is training included?**
We provide a Complete Training Package from train the trainer, administrator, to pilot group. We have a team of experts available to help you each step of the way. eLearning modules are provided for current and future staff. Sales training, coaching, and sales process analysis is also available.

11. **How long does implementation take?**
We provide a detailed step-by-step schedule and process to guide you through implementation. We start with data validation, a step-by-step CRM Playbook, to Pilot rollout and then full implementation – at your pace!

12. **What are the technological benefits of CallTrax NEXT?**
Browser-based technology provides the means to set permissions by role and have unlimited seats. CallTrax NEXT works with multi-institution holding companies and affiliates.

13. **What else can users do with CallTrax NEXT?**

- **Dashboards/Reporting**: Each role can have access to our comprehensive reporting tool. This also allows management to gain insight to sales and trends at every level from individual branch staff to the entire organization.
- **Incentive and pipeline tracking**: Track and manage your sales pipeline, referrals and incentive plans.
- **Integration with Outlook**: Whether it is sending and logging an e-mail or scheduling a meeting with one of your clients, CallTrax NEXT makes that a seamless connection.
- **Store documents**: Save an important file to a specific activity log, or to the client or household record, for convenient access when you need it.
- **Custom profiles**: Present important worksheets so your staff can capture relevant information like a new client questionnaire or customer accounts at other financial institutions.