CRM (Customer Relationship Manager)

What is CRM?

CRM provides support to front office business processes, including sales, marketing, and service. Each interaction with a customer is generally added to a customer's contact history, and staff can retrieve information on customers from the database as necessary.
Focus on customers value is key to a successful CRM strategy. Different customers have to be treated differently. Variables like customers ranking, actual value and potential value are strategy drivers.
(wikipedia)

What is FinanceCube CRM?

We have taken the concept of CRM one step further.
Not only is this a tool for your employees and brokers, it is just as much a communication channel for your customers and clients.

It is basically everything a CRM software need to be,
plus what you need to share with your customers.

- **Prospects and pipeline data**
- **Customer data**
- **Category**
- **Calendar**
- **Task list**
- **Client history**
- **Reason why letters**
- **Suitability letters**
- **Fact Sheets**

•share of calendar/resourced within a company

Making life easier
and clients wealthier

AdvisorCube™

Category

You may categorize your prospect and customer/clients the way you want. Each client may participate in more than one category.
For example Mr. Brown is a customer and included in the category “Beginner in the financial market”, but he is also in the category “Interested in new pension products”.
MiFID category “Non Professional”, “Professional” and “Counterpart”

Prospect

You may add as many prospect you like. You may attach them to categories. Generate mail merge documents for MS Word or email shot and at all time keep track on what you have sent and when. You may link prospects with meeting in the calendar and easily move prospect to clients by one click.

Customer

Your customer will have the best follow up in the market.
You store all your communication with your customer here, so that you get full track on all communication. You store all documents and files for the customer here. You can easily generate mail merge documents for MS Word or email shot.
The CRM is automatically linked with our valuation and portfolio reporting tool. It is also linked with our Fact Find and Compliance tool.

Task list

Our integrated task list is transparent for your customer/clients.
In the task list you normally store every task you have done with the client such as telephone calls, email, letter, reason why letter, suitability letter, other “treat your customer fairly”/MiFID regulated documents.
When you store it you can click on “Visible for customer”, and if you do the customer will be able to “read only” when he logs on.

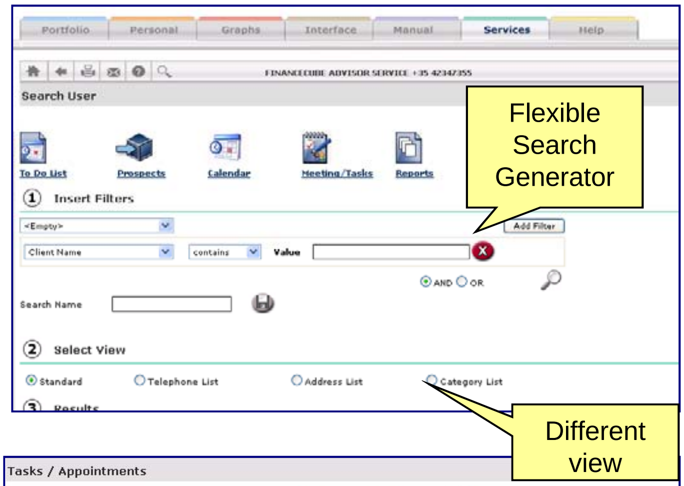
Calendar

Our integrated task list is transparent for your customer/clients.
You may share your calendar with you colleagues in your office or colleagues in other offices within your company. Each meeting or activity in your calendar can be linked with prospects and customers for task list reports.

CRM - Look and Feel

Search

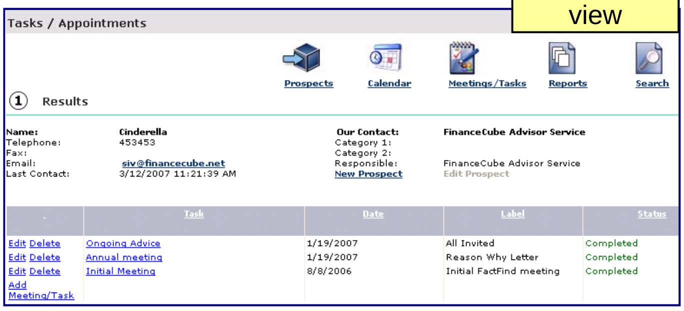
Easy and flexible search your customers and prospect database. View by address list, telephone list, email list or category list.



Client information

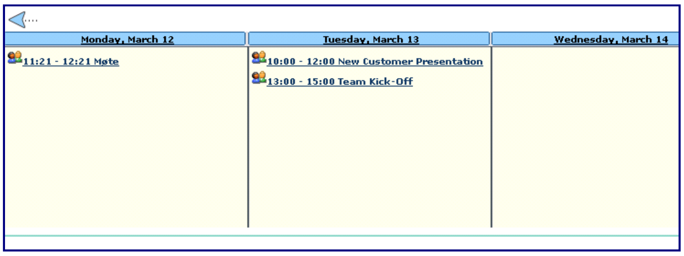
When you have selected one customer you will have the clients details, including

- reason why letters
- suitability letter
- emails
- telephone calls
- tasks



Visible for client

Click on the icon "Visible" and your client can have a look at your tasks and documents when they log on.



Calendar

Include tasks and meetings in your calendar. Share your calendar with your colleges and allow your customer to book meeting with you directly.

No installation

This is a part of the AdvisorCube web platform. No installation needed.