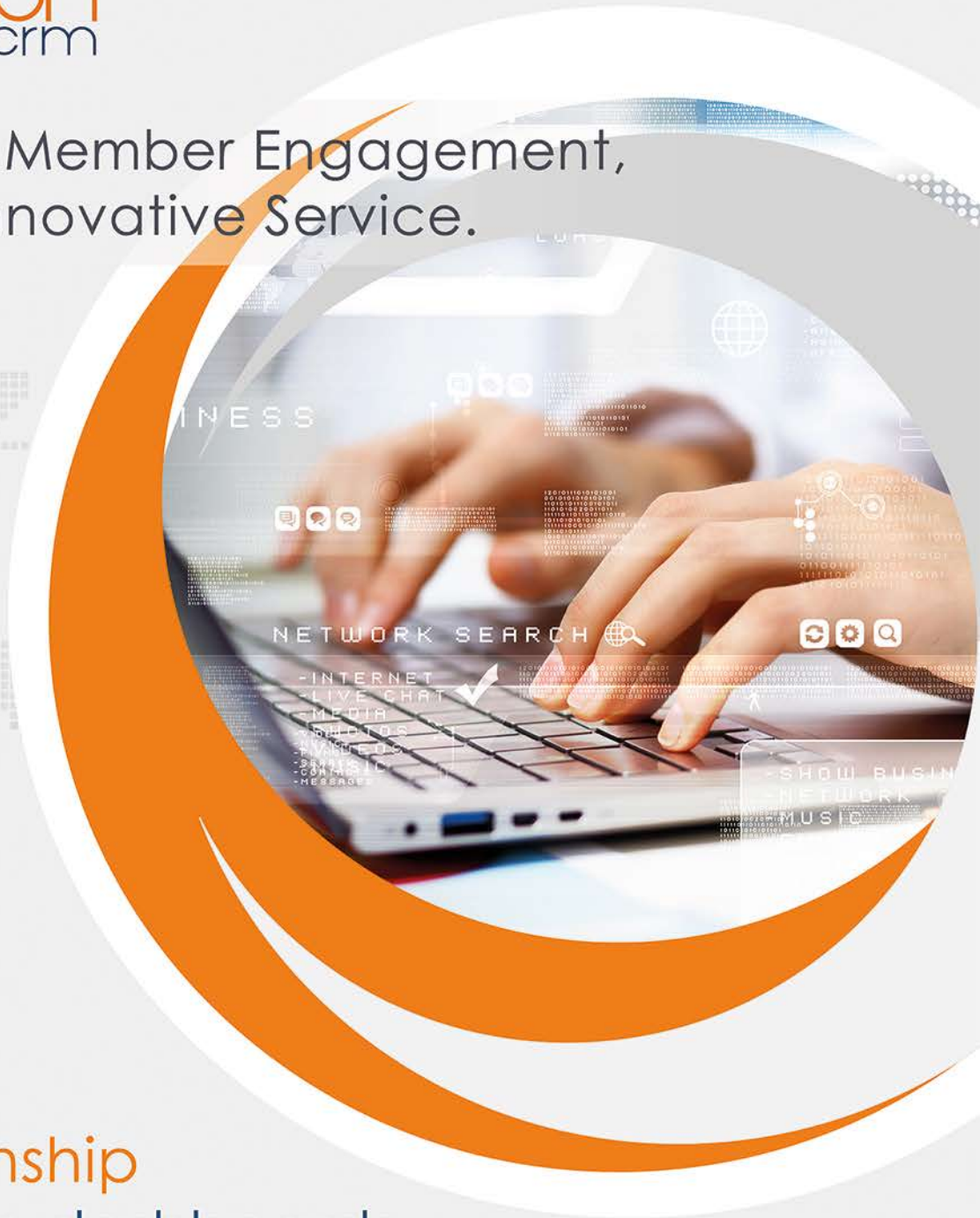




Your Solution to Member Engagement,
Growth, and Innovative Service.



Client relationship
and employee dashboards.

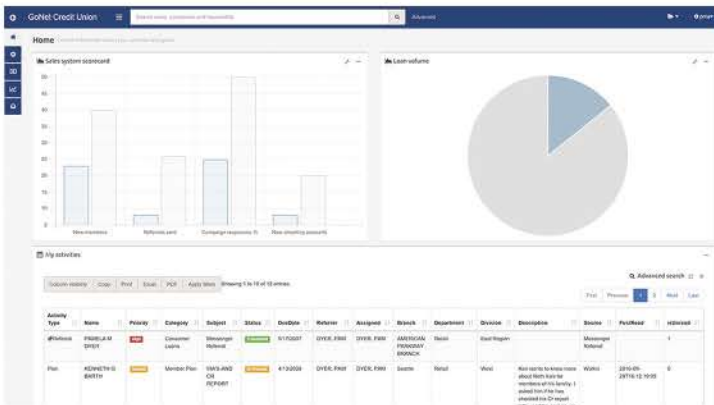


- Automated lead generation ●
- Goal tracking and reporting ●
- Cross-channel communications ●
- Customizable reports and charts ●
- Seamless integration. And much more! ●

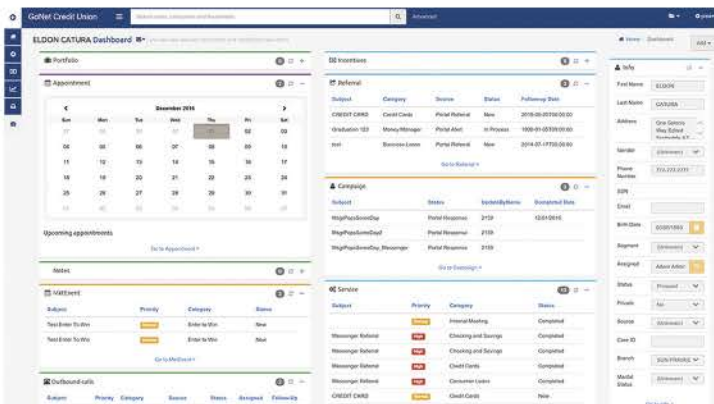
Has been designed and developed exclusively for financial institutions. It presents employee goals/actions and relevant client information in actionable dashboards, providing more function with fewer clicks. Flexible files allow administrators to customize global dashboards and provide individuals with options to personalize their view.

The modernized portal is accessible on your network via any web browser and its responsive design allows you to view and act in your dashboards from any tablet or smartphone.

Employee Dashboard



Member Dashboard



What you get?

- A single comprehensive relationship and activity view for each client.
- Automated referrals, alerts and lead generation.
- Goal tracking and reporting.
- Unmatched incentive calculation, tracking, and reporting.
- Consistent cross-channel communications.
- Customizable coaching reports and charts.
- Seamless integration to your core operating system and ancillary data sources.
- Activity management and reporting for each employee.

Several components are available to aid specific strategies

Marketing Management



Helping you to align marketing with front line efforts, maximizing effectiveness and returning valuable ROI data.

Sales Management



Supporting your strategic growth with sales and reward programs tailored to your unique sales culture.

Service Management



Improving the management of product and service issues, creating stronger member loyalty.