CUSTOMER AND LEAD MANAGEMENT

ACT BRAND CRM USED BY FUTUREGUARD

WHAT IS CRM?

- **CUSTOMER RELATIONSHIP MANAGEMENT SOFTWARE**
  - AN OFF THE SHELF TOOL TO ORGANIZE, CATEGORIZE AND CONSOLIDATE INFORMATION GIVING YOU CENTRALIZED RECORDS FOR CUSTOMERS AND LEADS WITH FAST EASY ACCESS.

POPULAR BRANDS

- ACT
  - LOCAL ON COMPUTER AND/OR WEB-CLOUD BASED

- MAXIMIZER
  - LOCAL ON COMPUTER AND/OR WEB-CLOUD BASED

- SALESFORCE.COM
  - WEB-CLOUD BASED ONLY

FUTUREGUARD USES ACT

- WE PRIMARILY USE THE LOCAL COMPUTER BASED VERSION WITH MULTIPLE USERS ON A NETWORK BUT WE ALSO HAVE REMOTE SALES PEOPLE WHO SYNCHRONIZE OVER THE INTERNET BUT HAVE LOCALLY INSTALLED DATA.

- WE ALSO USE THE WEB INTERFACE TO THE SERVER FOR QUICK ACCESS ON A PHONE OR TABLET

IT'S THE DETAILS

- KNOW EVERY DETAIL ABOUT YOUR CONTACTS INCLUDING VENDORS, CUSTOMERS AND PROSPECTS, SO YOU'RE INFORMED AND PREPARED FOR EVERY INTERACTION.

- ORGANIZE YOUR CUSTOMERS AND PROSPECTS BY GROUPING SIMILAR CONTACTS SO YOU CAN DELIVER TARGETED EMAIL MARKETING MESSAGES OR SALES OFFERS TO SELECT CUSTOMER SEGMENTS.

- USE TASK LISTS, REMINDERS AND CALENDARS TO EASILY PRIORITIZE AND TRACK PHONE CALLS, MEETINGS, TO-DOS, AND EMAILS FOR YOURSELF OR YOUR TEAM SO YOU CAN MAKE THE MOST OF YOUR DAY.

LET'S LOOK AT IT IN ACTION