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