

# Avolin

## CoreTrac CRM

### CRM for Financial Institutions

CoreTrac CRM is specialized for Financial Institutions and seamlessly integrates with their core business solutions. It gives a centralized view of community bank and credit union clients and helps provide consistent messaging and an improved customer experience. This tailored solution lets you capture and manage sales, service or support requests, and resolve any issue in a timely manner, without losing sight of up-selling and cross-selling opportunities.



## Drive Customer Loyalty and Satisfaction

Designed exclusively for community banks and credit unions, CoreTrac provides useful insights, adapts processes to the business, and helps improve company productivity with a flexible and customizable solution. This allows you to unite your financial institution across departments to put the customer at the center of every interaction, increasing sales, enhancing employee productivity and achieving greater client satisfaction.

### CoreTrac delivers the power to save time and automate:

- Prospect and client management
- Sales and pipeline management
- Case and support management
- Knowledge management
- Loan management
- Employee performance and compensation tracking
- Marketing communication management
- Product recommendations engine
- Reporting and analytics

### Benefits

- Drive customer loyalty through personalized experiences that delight your customers
- Eliminate departmental and data silos with a centralized view of client information
- Increase productivity through a customizable workspace
- Empower your business with robust reporting and measurement
- More efficiently manage events, meetings, tasks and appointments

CoreTrac makes your daily CRM tasks simpler with easy-to-use and customizable features. To find out more about how CoreTrac can help your financial institution please contact us at [info@avolin.com](mailto:info@avolin.com).

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Avolin provides critical software solutions to enterprises around the world, specializing in Customer Relationship Management, Knowledge Management, IT Support and Supply Chain Management. Over 1,400 customers in more than 50 countries use our portfolio of solutions to help them provide outstanding customer service, keep their day-to-day operations running smoothly and make intelligent decisions based on relevant and real-time data. Our customers are at the center of everything we do and our singular goal is to deliver the right solutions for their industry-specific workflows helping to keep them at the forefront of their industries. For more information, visit [www.avolin.com](http://www.avolin.com).