

## CoreTrac Lead Xcelerator

Building customer loyalty and trust through timely follow-up

Most Financial Institutions have a 'Contact Us' page on their website, but do they use it the right way? When an inquiry comes through your website, how do you follow up? Is that inquiry sitting in an email somewhere waiting to be answered or do you have the right tools in place to direct the request to the right person for a prompt response? If you are not doing the latter, you could be leaving money on the table.

CoreTrac Lead Xcelerator can help. It automatically distributes all opportunities and requests that come through your website – including immediate notification of a warm inbound opportunity – into a defined queue, which can go to specific employees in the organization. This automation enables staff to provide a prompt response and increase their chances of winning the business.

### With CoreTrac Lead Xcelerator You Can:

- Build rules so that your inquiries are routed in an efficient and prompt manner. Lead Xcelerator allows you to track the response rates for these incoming inquiries
- Understand what your website visitors are interested in so that you can have a meaningful conversation with them
- Keep on top of service requests so you can deliver an exceptional customer experience
- Generate product requests or new opportunities, set up meeting and service requests using your website 24/7

PRODUCT TYPE	PRODUCT	CONTACT	AMOUNT	QUEUE
<b>Queue - Brokerage - 401K</b>				
BROKERAGE	401K	Coil, Joe	\$0.00	Brokerage - 401K
BROKERAGE	401K	Smith, Frederick	\$0.00	Brokerage - 401K
BROKERAGE	401K	Jones, Robin	\$0.00	Brokerage - 401K
BROKERAGE	401K	Brown, Jim	\$0.00	Brokerage - 401K
BROKERAGE	401K	Jackson, David	\$0.00	Brokerage - 401K
BROKERAGE	401K	Jackson, Bo	\$0.00	Brokerage - 401K
BROKERAGE	401K	Brown, Chris	\$0.00	Brokerage - 401K
BROKERAGE	401K	Thompson, John	\$0.00	Brokerage - 401K
BROKERAGE	401K	Johnson, Rob	\$0.00	Brokerage - 401K
<b>Queue - Card Services</b>				
CREDITCARD	Mastercard Fixed	Thompson, John	\$0.00	Card Services
CREDITCARD	Mastercard Fixed	Couples, Fred	\$0.00	Card Services
CREDITCARD	Mastercard Fixed	Allister, Lynne	\$0.00	Card Services
CREDITCARD	Mastercard Fixed	Samburson, Gertrude	\$0.00	Card Services
CREDITCARD	Mastercard Fixed	Abraham, Jerry	\$0.00	Card Services
CREDITCARD	Mastercard Fixed	Sweeney, Allison	\$0.00	Card Services
<b>Queue - DDA Queue</b>				
CONSUMER CHECKING	Checking	Austin, Jeff	\$25,000.00	DDA Queue
CONSUMER CHECKING	Basic Checking	johnson, mary	\$0.00	DDA Queue
CONSUMER CHECKING	Basic Checking	Casper, Joseph	\$0.00	DDA Queue
CONSUMER CHECKING	Basic Checking	jenkins, mary	\$0.00	DDA Queue
CONSUMER CHECKING	Basic Checking	Thompson, John	\$0.00	DDA Queue
CONSUMER CHECKING	Basic Checking	Spears, Britney	\$0.00	DDA Queue
CONSUMER CHECKING	Basic Checking	Snoopy's Flight School	\$0.00	DDA Queue
CONSUMER CHECKING	Basic Checking	Peet, Amanda	\$0.00	DDA Queue
CONSUMER CHECKING	Basic Checking	Riley's Pet Sweaters, LLC	\$0.00	DDA Queue
CONSUMER CHECKING	Basic Checking	Finstone, Wilma	\$0.00	DDA Queue
CONSUMER CHECKING	Basic Checking	Salandori, Susan	\$0.00	DDA Queue
CONSUMER CHECKING	Basic Checking	Austin, Jeff	\$0.00	DDA Queue
CONSUMER CHECKING	Basic Checking	Brown, Jim	\$0.00	DDA Queue

## Timely Follow Ups

When a request or inquiry is sent to your Financial Institution, a timely response is key to building a good rapport with your clients and prospects. By adding Lead Xcelerator to your website, requests and inquiries are sent straight to your ResourceOne CRM, enabling designated staff to quickly follow up. Faster responses lead to higher customer satisfaction.

The screenshot shows a CRM interface for a case titled "CASE #1059: LOST DEBIT CARD". The interface includes a sidebar with navigation options like "OVERVIEW", "LOG", "NOTES", "EVENTS", "TASKS", and "ATTACHMENTS". The main content area displays the following details:

- CASE DATA:** OWNER: User (dropdown: Washington, George)
- CONTACT:** Thompson, John
- ACCOUNT:** 5345 - Check Card - \$0.00
- BRANCH:** Lexington (dropdown)
- LANGUAGE:** English (dropdown)
- PRODUCT:** Select Product Type (dropdown)
- PRODUCT:** Select Product (dropdown)
- SUBJECT:** Lost Debit Card
- DESCRIPTION:** Lost card over the weekend, needs to be re-issued (with a rich text editor toolbar)
- CATEGORY:** Check Card Inquiries (dropdown: Lost Card)
- CONTACT BY:** Cell Phone (dropdown)
- PRIORITY:** Escalated (dropdown)
- STATUS:** Open - Waiting on Customer (dropdown)
- RESOLUTION:** (dropdown)
- COMMITTED:** 2/9/2014 (dropdown)
- SATISFACTION:** (dropdown)

## Faster Responses Result in Higher Revenue

Your website can provide a self-service option in which a request or inquiry can be submitted at any time. Lead Xcelerator allows you to manage, track and account for all inquiries coming in. Employees can easily view a new opportunity in the queue and pull it into their own pipeline. Within each opportunity the employee can simply contact the customer, make notes and schedule a follow up.

Lead Xcelerator empowers employees to take action by making it simple to generate, process and track opportunities. In other words, Lead Xcelerator will help you sell more... and sell more easily! For more information on adding Lead Xcelerator to your ResourceOne CRM please contact us at [info@avolin.com](mailto:info@avolin.com).

# Avolin

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