



Innovest CRM

Innovest CRM, powered by Microsoft Dynamics, is an in-house customer relationship management business solution that drives sales productivity and marketing effectiveness through social insights, business intelligence, and campaign management in the cloud.

Customer relationship management (CRM) helps reduce costs and increases profitability by organizing and automating business processes that nurture customer satisfaction and loyalty in the sales, marketing, and customer service fields. Innovest CRM delivers ROI through marketing automation, customer service, and integration with InnoTrust. Firms are empowered to seamlessly turn prospects into clients, transferring information from Innovest CRM into the InnoTrust platform, maintaining tight integration throughout the conversion process.

Through integration with InnoTrust, Innovest CRM supports transactions, positions, posting distribution, and contact maintenance, information that is seamlessly transferred as account managers work to acquire and manage a healthy, dedicated client base.

System highlights include...

- Trust Integration, including
 - Transactions
 - Positions
 - Posting Distributions
 - Contact Maintenance
- Simplified Data Entry
- Customer Summary
- Role-Specific Process Assignment
- Multiple Entry Span
- Intuitive Configuration
- Mobile Compatibility
- Interactive Business Intelligence
- Easy Interaction
- Integrated Social Features
- Server-Side Synchronization
- Customer-Driven Updates
- Real-Time Workflow
- Custom Actions



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MANAGE



REPORT

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