5 INFINET TOOLS
TO ENHANCE BUSINESS MANAGEMENT

CLIENT CENTRAL CRM

- Infinet's Client Central CRM was built by Infinex specifically for investment programs and their representatives. Use Client Central to manage your client relationships and accounts.
- Benefit from all the features of this robust customer relationship management system, such as note-taking/reminders, creating households, generating marketing lists, and more.
- Maximize Client Central features to increase productivity and streamline your workday.

OPPORTUNITY PIPELINE MANAGEMENT

- Keep your prospects top of mind! The Opportunity Pipeline Management tool helps track your sales pipeline through each stage of the sales cycle.
- Easily and quickly summarize potential revenue via a helpful table format.
- Tack updates and remember necessary follow-ups to take advantage of every opportunity.

REFERRAL MANAGEMENT SYSTEM

- Infinex offers an easy-to-use option to track bank and credit union referrals! This system can be integrated into your financial institution's core platform.
- Mark referrals as qualified, track revenue generated from introductions, and even send feedback to the referrer, all through our Referral Management System.
- This system will make managing a referral and incentive program a breeze for your institution, generating additional promotion and leads to your investment program!

CLIENT CONNECT

- Client Connect delivers streamlined, branded account access for your investment customers. Once connected, they can view investment account assets and values from their bank or credit union logins via safe single sign-on access.
- Clients can also securely share & store documents through the Documents Archive tool.
- Give your clients easy access and a comprehensive financial picture while enhancing the relationship between your program and the financial institution. For more information, view our Client Connect information sheet.

INFINET DASHBOARD

- Save time by configuring your Infinet home screen or Dashboard to display the information you feel is most important to your business!
- Manage accounts, client relationships, and your book with over 30 widgets to select from and arrange as you see fit. There is no need to run multiple reports to check on your business, review action items, or access client reminders. Everything is now at your fingertips!