

CORETRAC'S RESOURCEONE

Build a strong sales organization with a robust, core-integrated, easy-to-use CRM/
Sales Tracking Automation solution built precisely for community financial institutions.

POWER

*-Benefits you can
bank on-*

Help your financial institution build an efficient, accountable, performance-based culture that will increase wallet share, protect market share from competitors, increase efficiency of all employees, and:

- Eliminate missed opportunities and revenue leakage due to poor handling of leads and referrals
- Make better informed decisions that drive toward strategic goal attainment with greater pipeline visibility and sales forecasting
- Motivate employees with accurate compensation and rewards while developing stronger client relationships

PERFORMANCE

*-Features that get the
job done-*

ResourceOne will help your organization easily adapt to client expectations, meet sales information and management needs, and provide exceptional service. ResourceOne delivers the power to automate:

- Onboarding
- Lead and referral tracking
- Contact and pipeline management
- Next-best product cross-sell recommendation
- Profitability tracking
- Service Center Case Management
- Up-to-date marketing campaigns
- Employee incentive, compensation, and goal performance tracking
- On-demand, comprehensive management reports

SUCCESS

-The Winning Edge-

Using the latest Microsoft technology, ResourceOne provides the highest quality technology to elevate your team's performance and enhance growth in your community. The ResourceOne solution delivers additional benefits with these great features:

- Save time with single sign-on authentication
- Gain a 360-degree view of your clients - a single solution across the entire institution
- Quickly and easily retrieve information using the knowledge base and intranet document storage capabilities provided in the Resource Center
- Send referrals to department or branch queues, or directly to another employee
- Synchronization with MS Outlook, Lotus Notes, and Groupwise

WEBINAR

-Visit Us Online-

Join us online to see ResourceOne in action for yourself. Simply visit

www.coretrac.com/demo

to receive information on where to view our
webinar online.