PIBA working with BROKER CRM CLIENT RELATIONSHIP MANAGER

The WorksCRM

A complete software kit for advisors

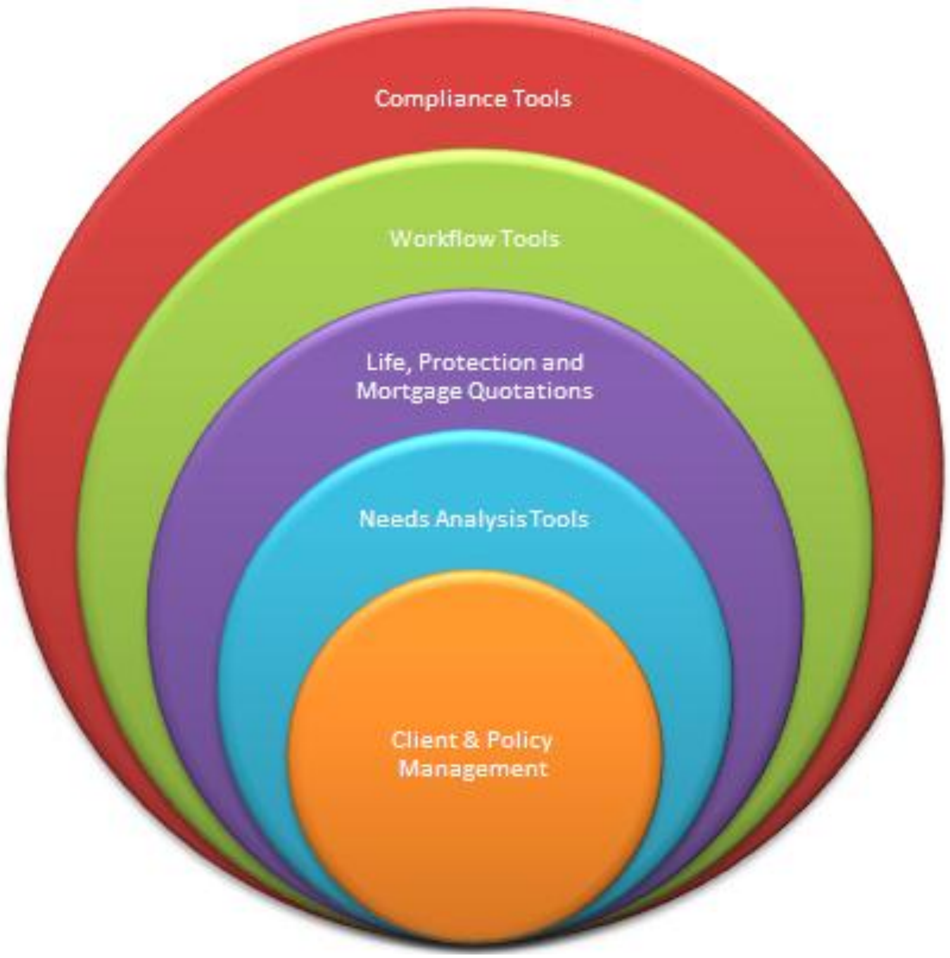
up to 63%* DISCOUNT for PIBA Members

*Offer based on a five user office tariff and a 12 month contract.
Normal price €275 per month, discounted to €100 per month plus VAT.

Integrating all the key elements of your business process

The WorksCRM software is the result of years of research and development with mortgage, financial services and insurance professionals , and built by industry experts who know what makes your business tick. It delivers a browser based solution for your client relationship management needs and money advice tools through leading edge technology.

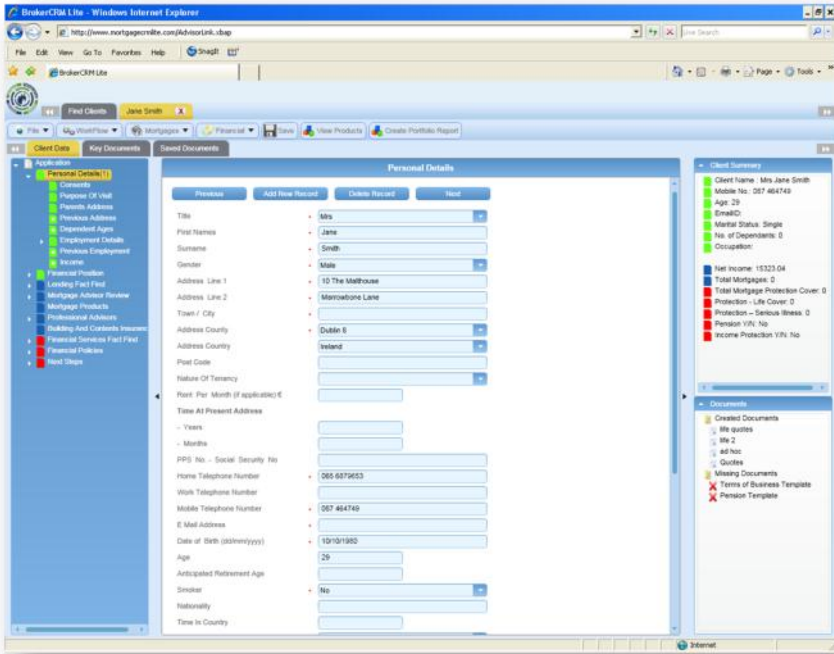
What does it deliver?



Key Benefits

- Instant web access to your client and product data. Multi user system to enable your office to work as a single joined up unit.
- Protection calculators and quotations from all your product providers,
- View consolidated client policies data and also print portfolio report.
- Complete workflow processes management including tasks, diaries, letters , emails and SMS.
- All your compliance documentation available at the touch of a button, and full archiving functionality.

What does it look like?



What does it cost?

Office with	Price
1 user	€50 per month
up to 3 users	€75 per month
up to 5 users	€100 per month
More than 5 users	Negotiated attractive terms

Please note:

- *These prices are subject to VAT.*
- *For each firm there will be a minimum contract period of one year.*
- *Training seminars will be arranged throughout the country to accommodate members.*

BrokerCRM Product Partners :

AIB

Allianz

AVIVA

Caledonian Life

Canada Life Ireland

CLARUS INVESTMENT SOLUTIONS

Friends First

haven

Irish Life

MoneyMate Investment Data Management

NEW IRELAND ASSURANCE

ZURICH

What do my industry peers think?

"I had been looking for a new CRM system for a while, and could not find a system that was specific/tailored enough to my Business model. I specifically wanted a robust system to act as a full data base for our Clients, and that could be used to record all Client data, and one that could be easily updated. I had a future requirement to be able to segment that client data into different Groupings, to enable us to re-engage with existing Clients on different/ new products.

*When we made the switch to **The WorksCRM**, I quickly became happy with the decision. The transfer of data was handled efficiently and did not take long, and the system is very easy to use. The team at **The WorksCRM** are always expanding the functionality of the system, and are adding a lot of new features, so I finally have the right platform to develop the business. The ongoing training and support, which can be remote or on-site, is excellent."*

***Frank Lenny QFA, (LIAMdip) ,** Managing Director*
Frank Lenny Financial Services (www.franklenny.com)

*We have been **BCRM** clients for more than 5 years. They have delivered significant benefits to our business by handling all aspects of the advice process. The easy-to-use calculators and quotation engines help us to quickly and efficiently search the market for products that meet our client's needs. The fact that the system links your client data with the calculators seamlessly makes it even easier.*

***John Mullane,** Managing Director*
GVM Mullane Financial Services (www.johnmullane.net)

What's next?

Contact one of our team to get a free consultation and demonstration of ***The WorksCRM***. We'll take you through some real case studies of how fellow brokers used the system to drive their business.

(065) 684 9675

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BROKER CRM
CLIENT RELATIONSHIP MANAGER

www.brokercrm.com