

CUSTOMER PROSPECTOR SOFTWARE



Customer Prospector Software (CPS) is designed for community-minded business people who develop and maintain long-term trusted relationships with their customers.

CPS is a unique tool to aid in your firm's learning the total needs of prospects and customers. With the information gathered your team is able to offer products and services to fill the customer's total needs, at the same time creating a more satisfied and profitable customer.

CPS enhances internal communications within your business.

To see a demo of the software, please visit our website at

www.customerprospectorsoftware.com



BENEFITS

This software benefits the entire organization and your customers.

HERE'S HOW:

- **Your customers** - because of questions you ask, your customers will be offered products and services that best fit *their* needs.
- **Lenders** - you can better target a perfect solution to fit your clients' needs.
- **Tellers and other customer contact personnel** - track conversational notes from client interactions to learn about what the business could offer to solve a problem.
- **Management** - track performance and success of product offerings within your enterprise.
- **Marketing** - launch sales initiatives or marketing campaigns based on information gathered from CPS.

FEATURES

- **Simple and easy to use** - gather information without overwhelming staff.
- **Customized questions** - customize the questions that lead to essential information to best serve the needs of the customer.
- **Conversation Log** - log all contacts with a prospect to keep open communication within your organization, empowering your employees to assist at all stages of the sales process.
- **Ability to synchronize with Outlook** to generate appointments and follow-ups as often as you need.
- **Export information** to a Word document to print and bring with you to a meeting to review your client's needs.
- **Avoid duplication of work** - copy and paste important conversational notes to loan files and sales proposals.
- **Instant access to information** about your customers.
- **Shared database** - many people can enter information at the same time, instead of one person having access to a spreadsheet.



define the edge



ARE YOU LOOKING FOR:

- A more effective call program
 - To protect your customer base?
 - To add new customers?
- An easy-to-use central customer/prospect database?
- A customizable database system that captures the information you want?
- A system that gathers information in the sequence you desire?
- A program that will help your employees more consistently follow up with clients?
- Software that will provide instant access to information about clients?

TESTIMONIALS

“CPS has provided us a centralized database to effectively communicate in house on active and prospective clients. It is an easy to use, organized tool for storage of client and prospect information allowing us to remain focused on the next action needed to grow the relationship. I feel the possibilities with CPS are endless and am thrilled to be using it.”

Kellie Janssen, Glenwood State Bank



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CPS

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**Where lead
generation results
in satisfied customers**