INVANTAGE
for superior client service

Contacts

Invantage Contacts allows firms to store existing and potential client contact details and communication activities to aid sales, marketing and client servicing.
The application allows a personal service to be offered to all clients.

In today's competitive market, client expectations are high and Invantage Contacts gives you a range of functionality to:

- Provide a personalised service to clients.
- Identify potential sales opportunities.
- Store sufficient personal and financial client information.
- Easily access client account restrictions and investment objectives.
- Give suitable advice and make effective discretionary decisions.
- Capture and manage groups of clients with similar interests.
- Display 'know your client' and other key information.
- Use financial information to drive marketing analysis.
- Integrate client communication with Microsoft Outlook for seamless email tracking and mail merge capability, task monitoring and meeting scheduling.
- Store and illustrate relationships betweens clients and third parties.
- Utilise this wealth of information for marketing campaigns and targeted lists.
- Capture and track communication activities.
- Capture and track prospective clients' lifecycle.

Contacts is highly configurable and can be integrated with other Invantage modules or third-party systems for easy access of information.

Regulatory Compliance

Contacts enables users to see the full range of information relating to clients' personal and financial profiles, investment objectives and restrictions, and dependency based information.

Client Contact

Contacts stores full professional and personal contact details for clients and related parties. All communication with clients or related parties can be captured, whether by email, fax, telephone or face-to-face meetings. Configurable categories and picklists enable specific reasons for the communication to be tracked, filtered or reported.

Client Administration

Contacts is highly configurable and allows the tailoring of screens and reports to match fact find forms or other paper-based documents. This will result in significant time savings and dramatically reduced error rates.

Marketing

The Contacts module allows the capture and management of prospective clients from initial contact through to client take-on and can utilise captured information to drive marketing analysis or campaigns.

Full Client Servicing

Contacts can be completely integrated with Invantage Documents and Portfolio modules providing organisations with the highest possible levels of personalised and flexible client servicing. Our modules are scaleable thereby providing an extremely cost effective solution that will enhance client retention and reduce administration burdens.

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