

Media Contact:

Jason Ovitt
Asylum PR
jovitt@asylumpr.com
847-275-2553



OptifiNow Helps Brokers, Agents Increase Customer Base

Add invaluable sales intuition to traditional CRM for banking, insurance industries

Staying aligned with the needs and expectations of today's customer is a challenging task for organizations of all sizes. There are many more moving parts to customer engagement than in the past, but less time to string together enough meaningful interactions to create full-blown relationships. OptifiNow makes it simple for anyone – even someone with no marketing background – to excel at customer relationship management and increase sales. The easy to use and fully customizable software not only alerts users when to reach out to customers to follow up or pitch them a new service, it can also automatically communicate with a prospect or customer with pre-approved, brand and legal compliant personalized messages. OptifiNow helps agents stay in touch with customers and prospect on time and on message, ultimately helping to close more deals.

Brokers and agents in the insurance and banking industries can rely on OptifiNow for traditional CRM functionality, plus more. OptifiNow is a modular Sales Automation platform that streamlines the day-to-day activities of sales. It helps agents stay focused on the priorities of the day and automates many of the mundane tasks that often keep them from meeting new prospects. Because the system is offered on a modular basis, clients can adapt the solution to meet their specific needs. The system is a fit for mid-size and enterprise organizations.

OptifiNow is unique in its combination of CRM functionality mixed with Sales and Marketing Automation, which drives Best Practice Processes and content compliance across an entire organization. Marketing can develop legal and brand compliant content. OptifiNow places the compliant content in the processes of the sales team for them to access and execute in their day-to-day client interactions. All the messaging can be personalized before it is sent out via email, print, text or social campaigns.

“Insurance companies and financial institutions that add OptifiNow to their current CRM solution are amazed at the improved sales results they are able to rapidly achieve,” said OptifiNow CEO John McGee. “Our intuitive sales tools not only identify lead opportunities, they inform brokers and agents what type of follow up to make with a lead, when to do it, how to do it, what content to use, what to post on social platforms, all of the guesswork is eliminated and the sales process is streamlined.”

The OptifiNow platform includes solutions for Lead Management, Sales Process Automation, Web Content Management, Marketing Collateral Management, Social Publishing, Social Collaboration and Business Intelligence. All of these can be used independently or as a solution suite, and are available both in a standalone or Salesforce embedded solution.

For more information about OptifiNow visit www.optifinow.com.

About OptifiNow

OptifiNow is an industry leader in SaaS solutions designed to optimize the effectiveness of the sales force. OptifiNow's platform is modular in design yet it offers a fully integrated solution including: Lead Management, CRM, Sales Enablement, Content Management, Marketing Automation, Social Automation and Sales Collaboration that allow the definition and automation of company specific benchmark sales processes. OptifiNow enables multi-channel timely, relevant, brand and regulatory compliant communication. OptifiNow supports Direct Mail, Email, Print, SMS, Social, and Telephonic channels of communication.