ClarityLive Prospecting

Data Sheet

We at Omnico are always looking for ways to help improve your operations and provide effective management solutions.

The ClarityLive Prospecting module is designed specifically to help you control, manage and increase membership sales. This module will allow you to record, track and monitor potential members from any source, such as drop ins, phone calls, emails, online requests and potentially as a batch import, (i.e. list of employees from a local business).

The prospecting module will allow the facility to email and SMS individual people and groups of people as well as communicating by letter and phone calls all from one system.

Once the prospect takes out a membership they will be moved out of the prospect state and into the membership area completing the journey

Summary of key Functionality;

- Fast input of basic details
- Easily promote leads to prospects, and then to members
- Setup contact preferences for telephone, email, SMS and letters
- Manage calls, appointments and to-do's in one place
- Manage membership advisors and monitor their progress
- Calender views for managers and MA's
- Track activity results and record notes
- Search for records and send bulk letters, emails and SMS
- Run reports to measure all aspects of the sales process

- Manage all sales and marketing information in one place
- Work across multiple sites

Please contact us to arrange a demo of the new module and have an opportunity to discuss the many benefits of ClarityLive prospecting for your business!