

Commence Corporation Offers CRM Service For Wealth Management

March 16, 2021

March 16, 2021 -
Eatontown, NJ based Commence Corporation is pleased to announce that they are offering a comprehensive CRM service for wealth management. Clients are welcome to get in touch today to begin working with Commence Corporation?s experts.

Providing wealth management services is not a simple task. It requires Commence Corporation to manage their relationships with multiple clients. In fact, their accounts range from large organizations to high-net-worth individuals. Wealth management firms used to rely on programs such as Excel and simple client filing systems in the past. However, the usage of these programs has been rendered obsolete as it is inefficient compared to other methods that are available today. Such old methods are not only time consuming but they also do not allow for the sharing of data entry and access to client information.

The good news is that Commence Corporation does not rely on these inefficient methods to provide their wealth management services. Instead, they have created a Cloud customer relationship management (CRM)

solution that allows their clients to quickly and efficiently capture, track, manage, and share important customer information to the people who use such data to fulfill their tasks.

Commence Corporation allows clients to capture their customers? complete 360 degree profiles as well as their interactions through telephone calls, notes, activities and email correspondence. Capturing this data is useful because it allows businesses to document their customer interactions and assess the potential for additional services. Those who use Commence Corporation?s wealth management services will also be able to schedule follow-up activities, share calendars, manage and store documents and record fees and time-slips. All documented information can be accessed from anywhere, at any time and with any device. This makes Commence Corporation?s wealth management services useful for significantly improving business performance, closing more business deals and increasing customer relationship management efficiency.

As noted on the company?s website, Commence Corporation?s Cloud CRM services can also be used to improve ticket management systems. This allows clients to carefully document and log each and every ticket within their software. It also gives them access to the tickets and information anytime they need them. For example, a staff that needs to face customers will have access to detailed information about the customers? personal information, purchase history, purchasing preferences and concerns.

Cloud CRM also allows clients to set points of contact between themselves and their customers. In fact, they can choose to set the data to include their company?s website, telephone, live chat, direct mail, marketing materials and social media. Other useful functions added to Commence Corporation?s Cloud CRM include the ability to automate workflow processes, document customer interactions and allow managers to track employee performance and productivity. This in turn enables businesses that use the Cloud CRM to optimize their efficiency by being able to do many important tasks without having to step out from the CRM system. Commence Corporation also provides some useful tips and information on their Youtube channel.

Peter Shoon, CEO of System Support Solutions, says in a testimonial featured on the Commence Corporation website, ?We were looking for a system that would become our core process for automating and managing sales. Our use of Commence CRM has done several things for us. First, it helped us to streamline our sales process from initial prospecting and logging of information to document management, quoting, support incidents and contract administration. Our decision to purchase Commence CRM was primarily based on its easy GUI and customizable views of information. I highly recommend this company and its product. Commence CRM has saved us perhaps $300k/year for 12 years, or a little over $3 million.?

Similarly, Sheena Williams of Koester says, ?We selected Commence CRM as a solution for managing customer relationships and tracking our sales activity. The shared calendar does a good job of allowing internal staff to coordinate and schedule appointments and vacations. We also use it as our main dispatch

calendar for our field technicians who provide on-site service and repair. Lastly, it is a great tool for customizing our event attendee lists, for use with tracking this information, as well as sending invitations. Commence is easy to use, extremely customizable and remotely accessible. We have been a customer for several years, and the customer support has been excellent.?

Those interested in Commence Corporation and the Cloud CRM services that they offer can learn more by visiting the company?s website. They can also connect with the company by visiting Commence Corporation?s Facebook page. Similarly, Larry Caretsky of Commence Corporation can be reached for further details.

###

For more information about Commence Corporation, contact the company here:Commence CorporationLarry Caretsky+1 732 380 9100sales@commence.com2 Industrial Way W, Eatontown,NJ 07724, United States

Commence Corporation

Commence Corporation is a leading provider of Cloud CRM for small businesses. Our web based CRM solutions are used by thousands of companies to streamline the front office business processes that directly impact sales execution and customer service.

Website: https://www.commence.com/

Email: sales@commence.com

Phone: +1 732 380 9100

