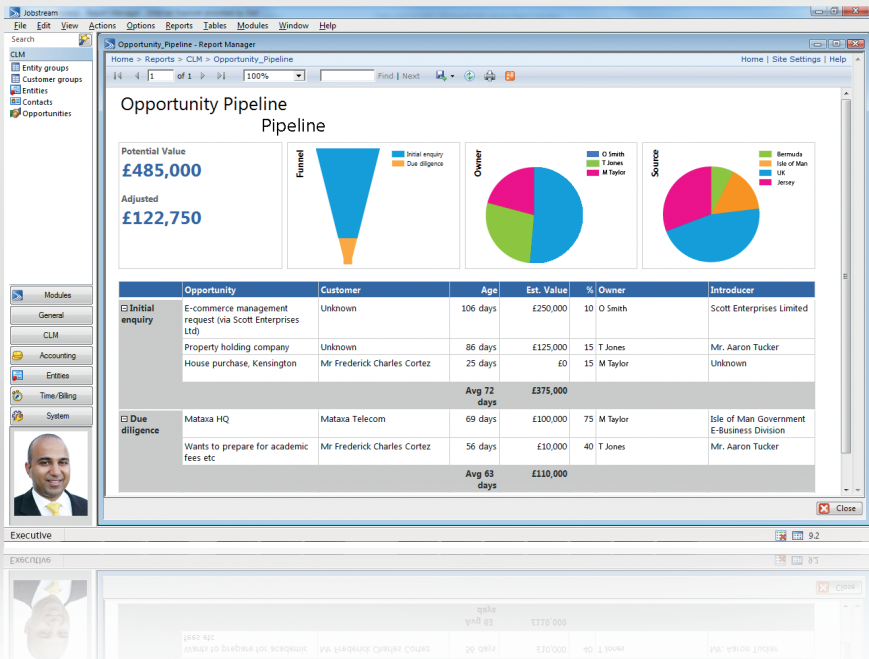


Customer Lifecycle Management

Gain a true 360° view of the entire customer-business cycle.

Seamlessly navigate directly from CRM content to other Jobstream application areas.

Build upon the proven and reliable Jobstream solution you already know.



Define customers and entities

- Identify an entity as a customer.
- Associate customers with other entities, e.g. a private client entity Stephen Smith is specified as the customer, with a set of trusts and companies run for him.
- Consolidate activities, time recording entries and documents across all entities within a customer group.
- Create management reports with data grouped by customer.

Record interactions and tasks

- Record the subject of an activity (i.e. the entity, opportunity, or contact it concerns) and who the interaction was with (e.g. a third party or intermediary).
- Log activities with a shortcut key from anywhere in Jobstream 9, quickly and easily recording interactions and tasks.

Create prospects and opportunities

- Create opportunities for an existing entity.
- Create opportunities against a prospect, where there is no existing entity.
- Track sources of new business by linking opportunities with introducers.
- Link opportunities with relationships, events, documents, and time items.
- Follow the full lifecycle of an entity: Entities created from an opportunity are always linked to that opportunity.

Manage your business pipeline

- Track lead sources and introducers to discover where you should be focusing your sales and marketing resources.
- Manage and report on your opportunity pipeline: stages and probabilities, close dates, initial and annual values.

Key features

Jobstream 9 is the global software platform at the heart of trust companies, family offices, and similar offshore organisations.

Customer Lifecycle Management (CLM) provides a true 360° view of the entire customer business cycle. It enables seamless navigation directly from CRM content to other Jobstream application areas.

- Define your customers**
- Record interactions**
- Create opportunities**
- Manage your pipeline**

JOBSTREAM GROUP

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