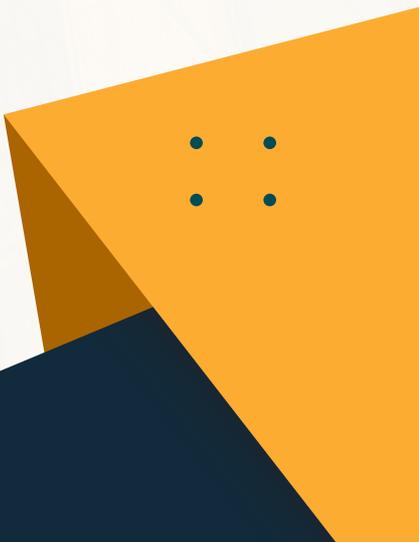




**FluidTasks**

**CUSTOMER CENTRE  
DATA SHEET**



# FLUIDTASKS CUSTOMER CENTRE

**Experience an effortless and highly efficient customer management workflow by leveraging the FluidTasks CRM's intuitive interface and comprehensive features.**

The FluidTasks Customer Centre is a robust and in-depth solution designed to streamline and enhance customer relationship management for insurance professionals of all sizes. With its powerful features and intuitive interface, our system empowers businesses to build strong customer relationships, improve sales effectiveness, and drive business growth.

## **Maximizing Efficiency in Centralising Customers: Unleashing the Power of Streamlined Operations**

Efficient Customer processes are a cornerstone of success, enabling businesses to maintain a strong customer focus and drive growth. With FluidTasks' advanced Customer Centre operations, organizations can optimize customer relationships, streamline workflows, and maximize productivity.

They can also deliver exceptional customer experiences, boost sales effectiveness, and pave the way for sustainable growth in today's competitive landscape by utilizing the FluidTasks Customer Centre.

FluidTasks offers a solution for managing customer details with ease. Our user-friendly form enables you to capture and store essential customer information, including KYCs, dependency details, health records, and more. This centralized repository ensures efficient management and personalized interactions.

Furthermore, our analytics dashboard provides valuable insights into your business, such as customer locations, allowing you to make informed decisions about market expansion. Additionally, by identifying customer-associated employees, you can assess team productivity and optimize resource allocation. Gain a deeper understanding of your customers' preferences by analyzing their purchase history and interaction patterns, enabling you to offer tailored products and services.

## **BENEFITS**

- Strengthen customer loyalty
- Boost sales productivity
- Gain valuable insights

## **FEATURES**

- Analytics and Reporting
- Customer Management
- Automation and Workflow Customization

# ANALYTICS AND REPORTING

## WHAT YOU GET

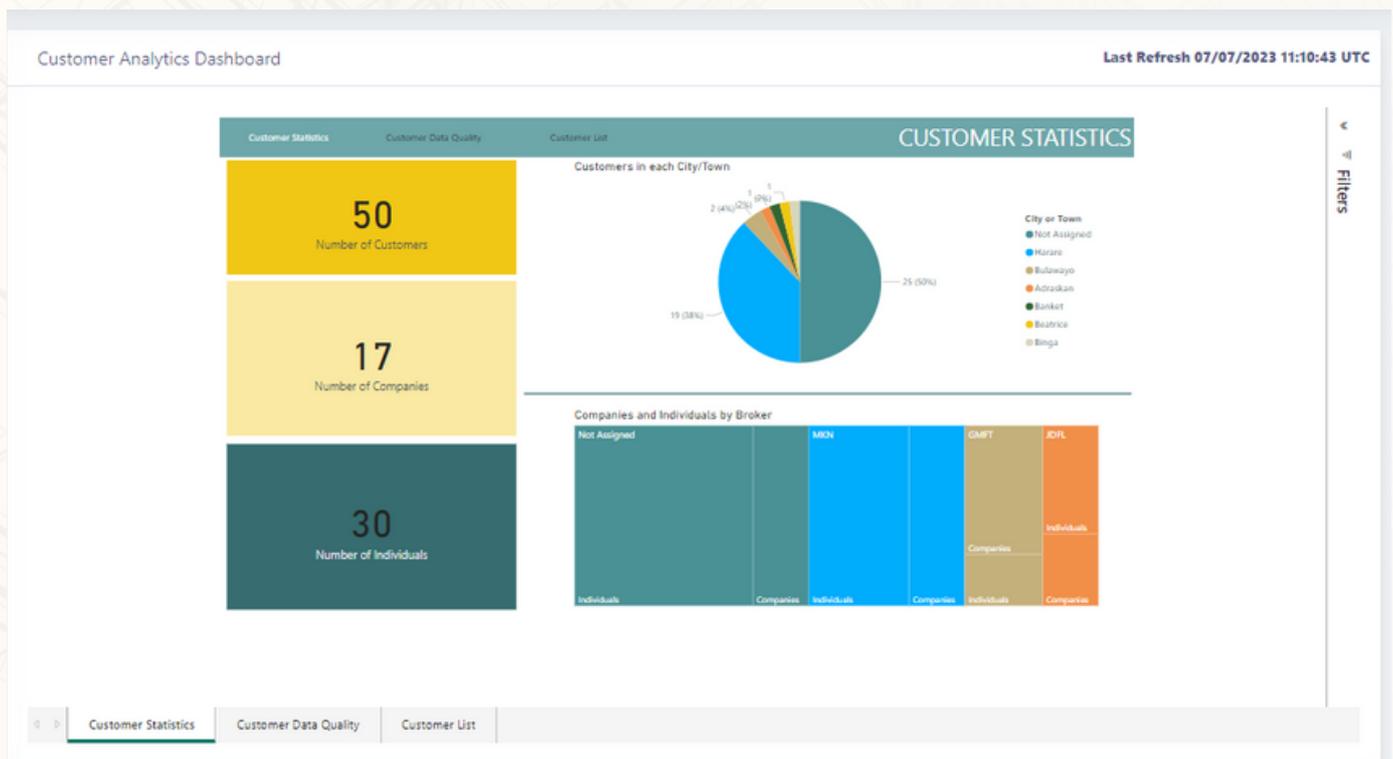
- Real Time Visualization.
- Performance Monitoring & Analytics
- Interactive Dashboards

It is crucial to have proper and relevant customer information in today's competitive landscape. However, manual systems often lack the privilege of organized and centralized data, making it challenging to derive meaningful insights from scattered information.

Our Customer Centre dashboard is a powerful tool that provides easy-to-understand data visualizations and empowers businesses with real-time customer insights.

The customer centre also allows you to ensure data quality, avoid repetition, and eliminate duplication. By assessing the relevance and accuracy of your data, you can trust that the insights you derive are reliable.

Using several filters in the customer centre, you can precisely obtain the data you need, enabling targeted analysis and informed decision-making.



# CUSTOMER MANAGEMENT

Information is invaluable, and the FluidTasks Customer Centre helps you to collect and harness as much data as possible. With our system, you can efficiently manage your customers, gaining in-depth knowledge about their needs and preferences.

It also offers a form where you can input all customer details, ensuring a complete and organized customer profile. You can capture crucial information such as dependencies, add KYC files, and provide commentary specific to each customer. This level of detail allows you to differentiate between customers and tailor your approach to meet their unique requirements.

Moreover, you can link specific employees to individual customers, enhancing organization and task assignment. By assigning specific team members to customers, you can streamline communication and ensure seamless collaboration, resulting in improved customer service.

FluidTasks allows you to harness the power of data to identify products or services that meet your customers' needs.

## BENEFITS

- Intuitive time saving forms
- Enhanced customer understanding
- Efficient customer management

The screenshot displays a customer management form with a sidebar on the left containing navigation tabs: BASIC DETAILS (active), EXTRA DETAILS, CONTACT DETAILS, BANK DETAILS, DEPENDENTS, KYC & FILES, and NOTES. The main form area is titled 'BASIC DETAILS' and contains the following fields:

Customer type:	Reference:	Identity No:
Individual	MKN-00001/102022	185226
Firstname:	Lastname:	
Ruth	Jonson	
Address:	Street:	
100 Test Address		
Suburb:	Post code:	
North West	00000	
Country:	City/Town:	
Zambia	Select...	
Email:		
isheanesudoro@gmail.com		
Mobiler:	Telephone:	
+16729993022	5555	
Tax:	VAT Number:	

# AUTOMATION AND WORKFLOW CUSTOMISATION

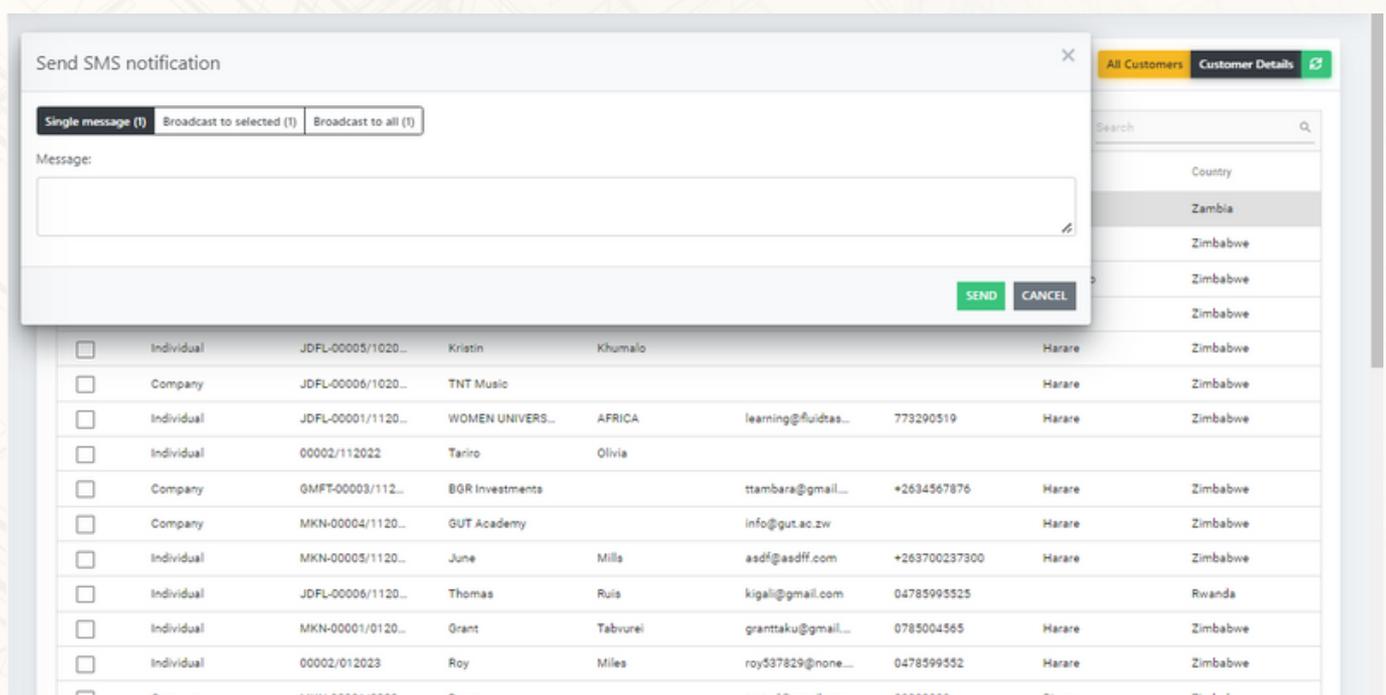
Automating repetitive tasks and streamlining your business processes with our Customer Centre's workflow automation capabilities is a very simple task. You can define rules, triggers, and actions to automate routine tasks, reducing manual effort and minimizing the risk of errors. An example is automatic messages.

FluidTasks allows you to set up time-based triggers to automate actions and reminders based on specific timeframes or deadlines. This feature ensures timely follow-ups, proactive customer engagement, and effective management of time-sensitive tasks like renewal reminders.

You can also seamlessly integrate your CRM system with other business tools and systems like messaging platforms with FluidTasks.

## BENEFITS

- Workflow Automation
- Time-based triggers
- Integration capabilities



FluidTasks is unified & cloud-based insurance platform that enables insurers, MGAs and brokers to focus on their competencies by leveraging pre-built digital solutions.