Client & Task Manager

Manage Client and Lead Relationships –Track Workflow

Organize your contacts
Control your workflow
Increase your sales

- **Client Contact Manager**
- **Task Resource Manager**

Client & Task Manager helps the…

- **Consultant** service the client more effectively by providing instant access to client and plan specifications, contacts and advisors.

- **Office Manager** control the office workflow and monitor staff resources.

- **Pension Administrator** meet plan and regulatory (IRS, DOL and PBGC) deadlines and prevent any due dates from slipping through the cracks.

- **Sales Team** record and track leads, generate individual and mass correspondence, and maintain prospect file for timely follow-ups.

CalcAir
Employee Benefit Systems

For additional information, please contact a CalcAir Sales Representative

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Client & Task Manager

Determine, at a glance, the status of any plan at any time using views you can customize, save and retrieve easily.

Client & Task Manager contains:

- Client & Plan information
- Task and workflow information
- Powerful query & filters
- Correspondence creation & retention
- Plans and Companies in existing database immediately available

Client Manager:

Client Manager goes beyond basic contact management to be a central knowledge point with advanced features to use system data in productive new ways.

- Key fields at your fingertips including: basic plan specifications (dates, eligibility, retirement requirements), contribution sources, as well as document information, investment data and participant totals
- Information is selective to the type of Plan maintained
- Assign Plan responsibility roles to your staff
- Stores all pertinent company information, with additional fields for keywords, billing and accounting details
- Track sales information, service history and accounting notes
- Track people who advise the plan for investments, insurance and legal matters
- Identify clients by a variety of selection criteria and quickly send letters, notices advising of changes in legislation, alerts, advice or invitations
- Create customized correspondence
- Merged correspondence can be sent by email or printed
- Contact history is maintained with the company
- Custom Report option allows for export of over 75+ database fields

Task Manager:

Task and workflow program that is ready to use and easily customized. Improve your office productivity and efficiency through workflow management.

Task Manager allows you to develop simple or multi-level templates (groupings of tasks) for the complex procedures of plan administration, plan qualification, and plan termination. These templates are then assigned to the plan and used to track the work progress of each administrator.

- Task library of administration categories and tasks. Designed for both basic and expanded task lists for plan administration
- Customize tasks and task templates to fit your firm's procedures
- Each Task detail includes: Description, Category, Assigned User; Priority; Scheduled start/end dates; Actual dates; Hours; Completion % and Notes section
- Several Views to track progress as a plan summary, Task Detail, Plan Detail

By being in control of the procedures that regulate your office, you can :

- Avoid rushed deadlines
- Allocate workloads fairly
- Identify problems & react
- Turn completed Tasks details into a resource:
  - Document plan issues
  - Collect data for billing

Task Manager gives the entire staff the ability to manage workflow in real-time with more detail than ever before.

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