



# Ability Portals **For Business Finance Brokers**

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# 5 things you should expect from a CRM

- Manage clients & cases with ease
- Automated contracts & applications
- Organise your sales funnel
- Streamline your day-to-day workflow
- Track the growth of your business

# What does a CRM do for me?

## The problem

- Slow updates via email
- Unorganised information
- Missing information
- Manually make case documents
- Saving files to your PC/drive

## The product

- Client portals
- Case management
- Fact finding
- Application tracking
- Document library

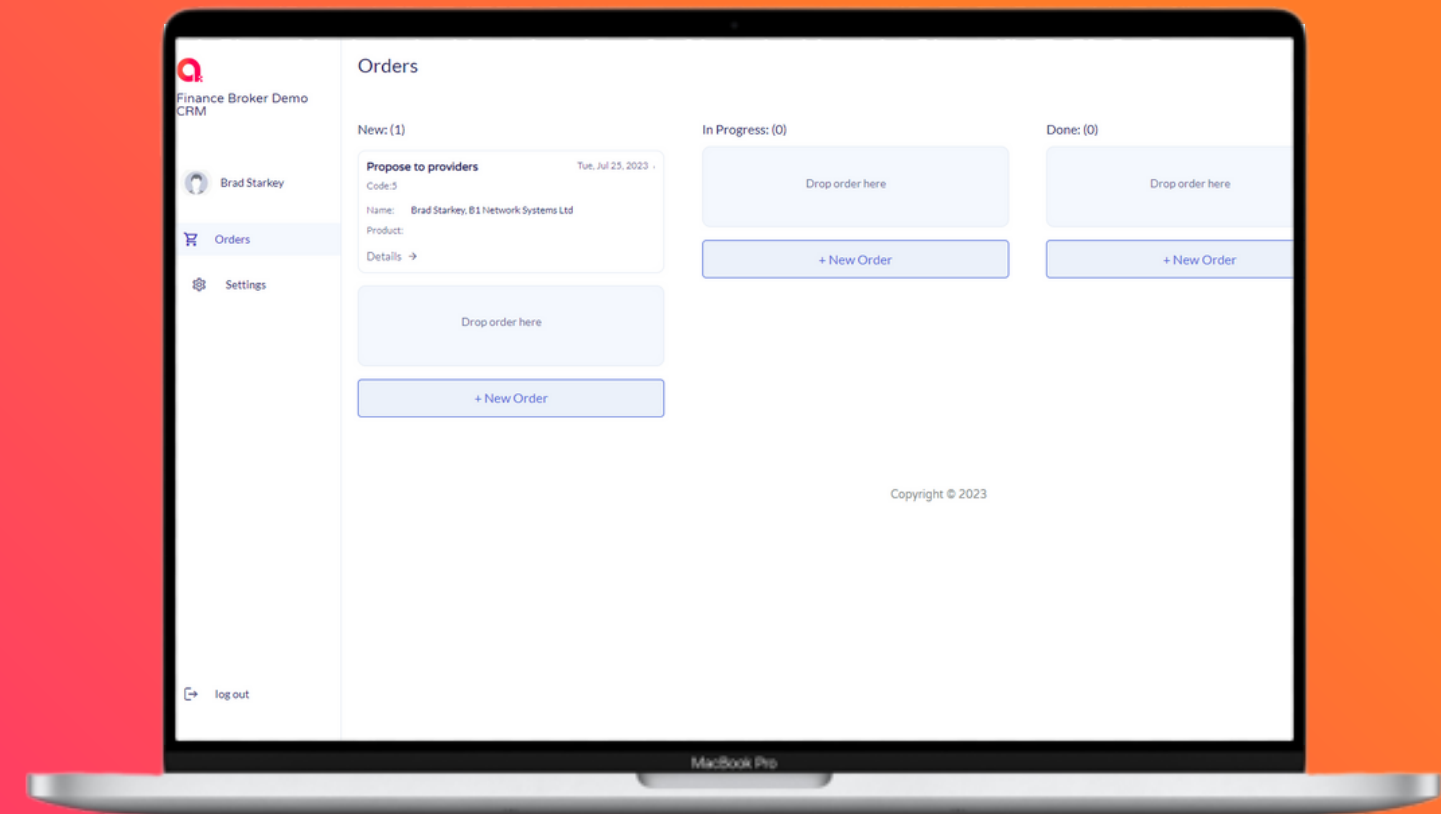
## The solution

- Trust & transparency
- Streamlined workflow
- Accurate data capture
- Quicker submission to banks
- Save files with cases

Transparency | Trust | Communication

# What does a CRM do for my clients?

- Upload their documents
- Track their cases
- Add new cases
- Get email & SMS updates



Transparency | Trust | Communication

# Qability

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