

Build your pipeline through one simple interface



Generate and manage leads with an easy-to-use sales tool.

As part of your total MoneyWise integrated content marketing system, LeadMaker helps you create a lead and referral database that is designed to generate sales. LeadMaker does this by capturing timely lead information and driving those leads from your branches to investment and mortgage advisors, business development officers and product managers across your organization.

How it Works

As a sales pipeline tracking tool designed specifically for financial institutions, LeadMaker makes it easy for you to keep track of leads and referrals. LeadMaker also makes it easy to track all of your team members, letting you see who is referring, meeting and closing sales in the pipeline.

By filling out a simple form, your customers indicate financial product needs and interests. From there, that information is transferred into LeadMaker, letting your sales representatives follow up with the potential sale and make appointments to meet right in the system. LeadMaker is also designed to be used in the branch environment, making it easy for front-line staff to make appointments and send referrals to the right people who can help the customer.

MoneyWise LeadMaker Helps...

Front-Line Employees

- Set up appointments and referrals on the spot.
- Print appointment confirmations for customers in the branch.
- Track their referrals.

Sales Representatives

- Manage appointments and referrals on their own calendar.
- Easily update referral and appointment status.
- Generate reports by individual or branch to reward employees.

Your Customers

- Gain easier access to the exact person at your bank or credit union who can help their financial need.

Designed Specifically for Financial Institutions

MoneyWise LeadMaker is a turnkey sales-management tool made just for financial institutions! LeadMaker is designed to be a cost-effective, user-friendly solution made for the branch environment. Start using LeadMaker and enjoy the profitable interactions between your customers and staff all while being able to track progress.

See how MoneyWise LeadMaker can generate better leads for your bank at truebridge.com/demo.

