



# Branch LeadMaker

**Generate and manage more viable leads with our easy-to-use sales appointment and referral system.**

As part of your total Truebridge Integrated Content Marketing System, Branch LeadMaker helps you create a referral database that is designed to generate sales 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.

With the simple addition of Branch LeadMaker to your Truebridge platform, you have a cost-effective way to generate more referrals, which gives your sales staff more opportunities to connect one on one with customers and discover cross-selling opportunities.

## How it Works

By filling out a simple form, customers indicate financial product needs and interests. A list of sales channels and contact names as well as instant access to each sales person's calendar are readily at hand.

## Branch Leadmaker Helps ...

### Frontline Employees

- Set up appointments and referrals on the spot.
- Print appointment confirmation for customers before they leave the branch.
- See exactly where referrals stand.

## Sales Representatives

- Manage appointments and referrals on their own calendar.
- Easily update where every referral and appointment stands.
- Run reports by person and branch to reward employees who made referrals and to identify those who need referral technique training.

## Your Customers

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

## Your Institution

- Enjoy profitable interactions between customers and your front line and sales staff.
- Get return from your branch system.
- Obtain increased share of customer wallet.

## Branch LeadMaker is Designed Specifically for the Branch Environment

Tired of sales management tools that are too costly and have to be modified to suit you needs? Branch LeadMaker is designed exclusively for financial institutions, is cost effective, and is very user-friendly.

**To see how Branch LeadMaker can generate better leads for your branch or to request a demo, visit [www.truebridge.com/leadmaker](http://www.truebridge.com/leadmaker) or call 617.956.5020**