



## Growing Your Business with Improved Sales Execution

**Smart Agent™** is an online Customer Relationship Management (CRM) tool built specifically for independent insurance agents and financial planners. It is a secure application that you control with the capabilities needed to increase sales, stay organized, and grow your business.

Using the **salesforce.com** development platform, **Smart Agent** provides market-leading sales automation. **Smart Agent** is designed to easily provide a positive return on your investment. *There is no other product on the market today with the features and vision of SmartAgent!* Sign up for a free trial today at [RiverBluffTech.com](http://RiverBluffTech.com).



### Features

- Accounts, Contacts, Insurance Products, Policies and Benefits allow you to store information about your prospects and customers quickly and efficiently
- Certifications and Continuing Education allow you to track activities to improve your ability to sell, keep current on licensing, and understand products in your portfolio
- Reporting capabilities give you quick access to information about your clients and prospects
- Tasks allow you to track the commitments you make and ensure you close business in your pipeline while you gain and maintain the trust of your customers
- Standard integration with the calendar of your choice means you can use one calendar for all your activities

### Benefits

- You are in control – You decide who has access to your customer and prospect data
- One system for all your business - enables agents to track all their business regardless of carrier, ensuring a complete view of their book
- Reduced IT Support – built on **salesforce.com**, Cloud based, no hardware to buy, safe, secure, backed-up, always available system
- Priced right – closing one deal pays for system
- Always connected – ultimate virtual office, access your data on your smartphone or tablet to ensure you always have your valuable client and prospect information right at your fingertips



### Get Started Today

**Smart Agent** is an online system you can begin using immediately to improve your sales productivity and grow your business. Sign up for a free trial today at [RiverBluffTech.com](http://RiverBluffTech.com).