

Powertrak™ Education and Certification Manager Solutions for the High Tech/Light Manufacturing Industry

Maximize customer service using the right staff person to work with the right customer. Keep your people trained (and in regulatory compliances), keep them loyal, and keep your revenue up.

Powertrak Education and Certification Manager places all the certification, class attendance and test scores in one place so you can manage career paths, identify opportunities for key customer match-ups, and track key class and test dates and save you time. Easily follow up on key renewal dates, and quickly find everyone who may need to attend classes to stay in legal compliance.

With optional integration to Powertrak Portals, you can help your staff and partners make the right moves at the right time to reach their financial goals. Locate certified staff, summarize classes, assets, watch testing results and look for opportunities to build quality service teams and increase your revenue, with 24x7 web access you can avoid administration cost, cut back on paper follow-up and keep education status current all in one system.

Product Summary

Monitor your Staff Training in One Place

Save time by tracking every class, certification, test score and trained professional in one place.

Built on Microsoft Dynamics CRM

Expand on top of the safe and powerful Microsoft platform.

Match Sales and Service Staff to Sell More

Find the right skilled person to work on special customer needs right from the education screen to quickly service your customers.

Stay in Regulatory Compliance and Lower your Risks

Knowing what your staff can sell and what they are working on makes it easy to avoid problems and help them stay on top.

Renewals and Changes can Trigger Alerts

Use the companion Renewal Manager and Workflow trigger reminders and alerts - nothing falls through the cracks.

Improve Staff Loyalty

Let them know that you care about their career and future. Keep your staff moving toward their goals.

Optional Links to Self Service Portals for your Partners

Optional Portal integration makes it easy for staff and partners to view and update education records anywhere, anytime.

Product Details

Education Summaries & Details

- Keep a complete view of all staff and partner certifications, class attendance and test scores, right inside your browser.
- Powertrak provides a complete, yet simple certification and class listing.
- You can drill down into individual item details to save time digging into other systems!
- For both individuals and business units, you can see the whole picture.

Find and Match

- Powertrak shows you who has what certification, when they went through classes and highlights skill sets so that you can build the right service teams and provide a full-service solution to your customers.
- You can take immediate action to protect or enhance your client service levels.
- Get your staff and your customers to realize their full potential.

Product Details

Look for Compliance Problems

- With turnover and regulatory changes, there is always risk of being out of compliance in an account, in an individual office, or with a product.
- Use Education Manager to stay ahead of the issues.
- With full education details for individuals and business units in one place, you can monitor compliance and make sure that you are ready to sell and service a wide range of financial products.

Streamline Your Follow Up Calls

- Lower your costs and improve service through the use of renewal management and key date tracking and scheduling.
- For every important compliance date, Powertrak gives you a simple, efficient way to trigger and manage every communication.

Built on Microsoft Dynamics CRM

- Microsoft CRM provides a safe path for scalability, integration, and business value based on Microsoft .NET and Web Services architecture.
- Powertrak is built in the same tools and shares the same data.

Use Microsoft Outlook

- Save time and money using e-mail, appointments, schedules, meetings and call history review right inside the Microsoft office tools that you already know.
- Renewal Manager uses Microsoft Outlook and optionally pops alerts into e-mail, to keep you informed everywhere.

Share Information & Self-Service

- Integrated Powertrak Portal and Microsoft Dynamics CRM modules provide completely shared data and improve the efficiencies of every department.
- Even your partners can check and maintain their own records to keep everyone up to date easily over the web.

Track Your Staff and Your Partners

- Powertrak handles both internal and partner education needs.
- You can provide individual education and class management, broker-dealer, and consulting advisor tracking in one system.
- Powertrak provides tools to tailor screens and data items to get just the familiar feel that you need.

A Complete Wealth Management Solution

- Add Powertrak modules for Portfolio Analysis, Brokering, Retail Banking, Marketing, Time and Billing and third-party tools like Financial Planning, Agency billing and Financials as you go to round out a complete one-stop solution.