Broker Forward™ CRM App

Manage: Broker data entry & updated in an automated workflow environment – coordinate with Tuo Marketplace to manage broker self-registration, licensure & appointment processes

Track: Communications, quality/training, licensing/ appointment, complex agency hierarchies, commissions, metrics & benchmarks

Act: Make analytics actionable! Build outreach lists for automated communication, **put a complete view of the broker at the fingertips of your service team**, easily report on & analyze broker data

Integrate: with your core broker management & commissions systems to extend capabilities for tracking & managing communications & critical interactions (uses standard CRM integration web services)

Customize: Easily customize & extend to meet unique needs of your organization – use our dashboards & forms or design your own, drag & drop modification

Incentivizing • Sale Tracking • Commissions • Communications • Training • Service

Broker

Colibrium
An HGS Company