

Fidelis & Radius CRM

Quoting, Enrolling, and Tracking your clients has never been easier!

 **Fidelis**
consultants

radius

What is Radius CRM?

First of all, if you're new to the CRM world, CRM stands for **Customer Relationship Management**. Radius is an extremely intelligent CRM system that can help you manage all your existing and future clients in one place.

What features does it offer?

✓ **Quoting** - We have integrated the CRM with multiple third-party quoting sites. You can quote Medicare Advantage, Medicare Supplements, Medicare PDP's, Final Expense, and Life Insurance. More product lines are continually being added as well!

✓ **Client Access** - Do you want to be able to offer your client quick access to all the information about the plan you sold them without having to spend hours calling carriers, searching through your CRM, and sending an email? With Radius CRM you can quickly grant them access to their file through a clean, professionally designed web link.

✓ **Track Leads** - Within this platform you can input one lead or import a whole list of leads. Track your leads from the day you received it till the day you enroll them on a plan. You can also set automated workflows to text and email your leads to remind them about appointments, say happy birthday, or whatever custom automation you want!

✓ **Calendar Integration** - If you use Google calendar, you can integrate it with Radius CRM. Seamlessly set appointments and reminders to your Google Calendar from the CRM!

✓ **Track Clients** - Much like lead tracking, you can automate all communication to your clients. Set automated texts, emails, reminders or whatever you want! Keep all your client data in one place for easy tracking.

✓ **Carrier Files** - Access the carrier's most important files from the CRM. Need a summary of benefits? It can be accessed when quoting any of the carriers we offer.

✓ **Plus More** - These bullet points are just the beginning! Speak to your sales director today to make your life easier with Fidelis' Radius CRM.

So, what's it going to cost?

There is both a monthly and annual pay option. Fidelis is offering a discounted rate to those that pay annually.

Take advantage now!

MONTHLY COST

\$34 /MONTH

ANNUAL COST

\$350 (\$29.20 / MONTH)