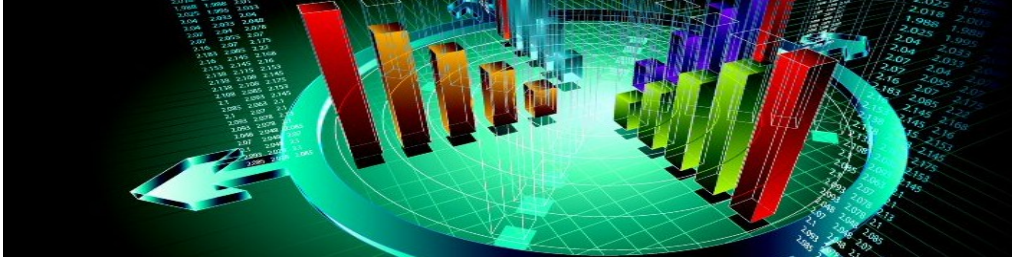


CRM for Third Party Administrators™

www.questvar.com



Integrity and efficiency, the foundation of successful Third Party Administrators.

Quest Business Solutions addresses the operational challenges common to TPA firms by automating the repeatable processes required to manage a profitable and annuitized franchise. **CRM for Third Party Administrators™** is a tailored TPA management solution that connects the right resources, to the right people, with the right information. Customized specifically for TPAs, this solution provides the ultimate tool for Retirement Plan Management. **CRM for Third Party Administrations™** offers the insight necessary to leverage valuable Referral Source relationships to deliver loyal Plan Sponsors.

Centralized Solution

- Manage your TPA practice through a seamless, centralized vision, with a focus on client retention and growth
- Understand plan profitability and client service interactions
- Track referral source effectiveness
- Negotiate competitive offerings with Fund Companies and Clients using fact-based data
- Minimize operational costs associated with Plan and Sponsor management
- Maximize revenue by spending more time enabling opportunity and less time duplicating back office efforts

Arm your Team with Tools to Succeed

CRM for Third Party Administrators™ is built upon the proven Microsoft Dynamics CRM platform and works seamlessly with Outlook. Users are able to enter and track activities, appointments and e-mails in specified accounts without duplicating data input. The familiar environment is easy to use and facilitates user adoption.

Revitalize TPA Strategies

Access TPA Folders through Microsoft Outlook

Track Plans and Participants to Plan Sponsors

Determine Plan status—Active, Inactive, Pending

Associate Plans, Plan & Service Types, Investment Portfolios, Status and Plan Administrators

Manage Sales Opportunities, Correspondence, Marketing Collateral and Performance Metrics

Imagine . . . an environment where the inter-relationships between Plan Sponsors, Plan Administrators, Sales Influencers and your Client Service Organization are all operationally harmonized to maximize performance, profit, and client satisfaction.



7920 Belt Line Road, Suite 215 - Dallas, Texas 75254 - Phone 972.238.5005 - Fax 972.238.5010

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