



Automated Referral Tracking for Financial Institutions

Still Tracking Referrals Manually? Let our Automated Referral Tracking system do the work for you!

- **Communicate referrals instantly** - tellers or other front line personnel enter the referral and it is instantly sent to the intended recipient.
- **No more paper tracking forms** - everything is at their finger tips as a link to their work station.
- **Generate instant status reports** - Sort by product, closing date, person, status.
- **Simplify follow-up** - Frontline personnel that are compensated based on closed referrals will appreciate this feature. No more calling to see what has been done about the referral.
- Built in up date prompts let all parties know the status.
- **No More Fear** of asking the customer over and over again - Tellers will have instant information about which customers have been contacted about specific products.
- Customizable



* Requires the installation of a DVR PowerLearn Appliance.

❖ DVR PowerLearn Appliance

PowerLearn enables financial institutions to run DVR products such as the Referral Tracking, e-Learning Courses and DataLink directly from their network.

DVR will provide the necessary hardware, software and instructions to easily install the appliance. The server will fit in a standard 19" equipment rack.

❖ Optional DataLink Internal Website

Use DataLink to communicate product changes, staff announcements, success stories, sales and service tips and link to important documents to your employees!

DataLink features an easy to use administration interface that enables any authorized user to easily change content. For a demo please visit www.dvrtraining.com/referrals.



For more information visit www.dvrlearning.com/referrals