1. CRM Overview

7. CRM Best Practices · https://clients.financevine.ca/docs/crm-your-secret-weapon-for-success-with-financevine-leads/

The Purpose of a CRM

A **CRM** system is designed to help you build and nurture relationships with your clients. It provides a centralized platform to store client information, track interactions, and manage your sales pipeline. With **FinanceVine** leads integrated into your **CRM**, you can effectively manage the entire client journey from initial contact to conversion and beyond.