

# Smartlink for Mobile Assistant<sup>®</sup>

## Free up valuable time with streamlined note-taking

During a typical day, busy professionals often have little time to take notes on the many important conversations that transpire. After a typical client meeting, two thirds of our short-term memory is lost after just one hour, and ninety percent is lost after 24 hours. Yet the effectiveness of your business depends on communicating with your clients and keeping track of their wishes and concerns. Having a record of all your important conversations can go a long way toward maintaining the level of communication necessary to maintain strong client relationships.

### Note-taking made easy

SmartLink for Mobile Assistant is the note-taking solution for professionals on the go, and it's as easy as making a simple phone call.

After a meeting, simply call Mobile Assistant from your mobile phone and speak your observations, impressions and plans. A professional transcriptionist handles the rest,



typing your message verbatim and sending it to you by e-mail the same business day. A copy is also automatically posted to the contact's SmartPad in SmartOffice.

**The result:** No more guesswork about which stage you were in with a sale. No more struggling to recall crucial details from a conversation you had a week ago.

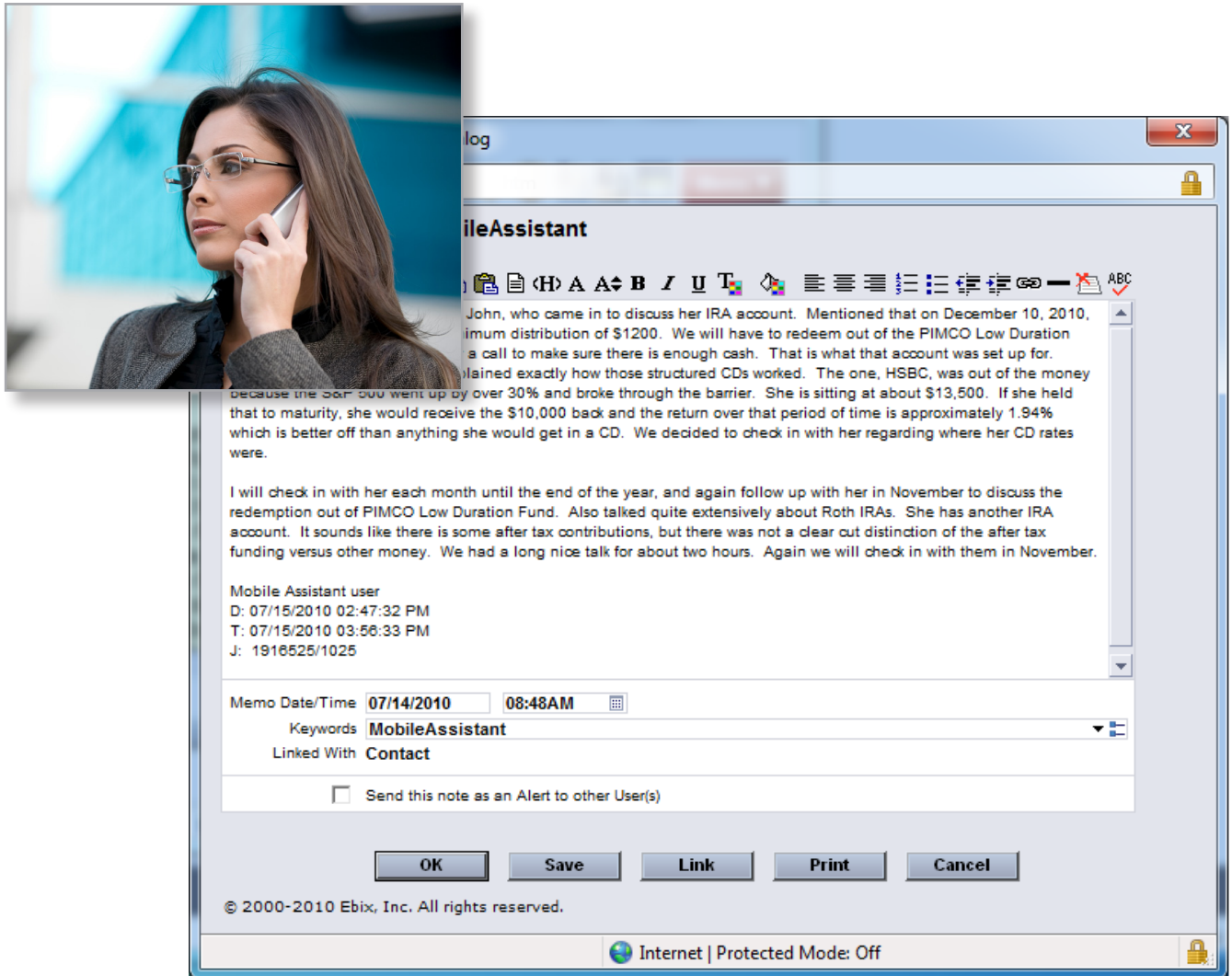
Mobile Assistant takes security and confidentiality seriously. It complies with both HIPAA and Gramm-Leach-Bliley and carries cyber risk insurance to further protect you and your clients.

#### DATASHEET

- Streamline the note-taking process
- Document all of your business conversations more accurately
- Reduce your note-taking responsibilities to a simple phone call
- Ensure compliance with online activity tracking
- Automatically identify clients who need portfolio rebalancing

# Organization and efficiency with SmartLink for Mobile Assistant

- By including your assistant or partner in your in the automatic report delivery, next step instructions are communicated without additional follow-up by you.
- After each appointment, taking 3-5 minutes to speak your notes, impressions and next steps will result in detailed documentation that can be easily filed with your client information.



To learn more about the Smartlink for Mobile Assistant,  
call 800-777-9188 or go to [www.ebixcrm.com](http://www.ebixcrm.com).