Foster stronger client relationships with BeeCastle

BeeCastle is a relationship analytics and management platform that builds stronger business relationships as well as higher customer life time value and retention.

Bring structure to your client networks

- Single platform to group, organise and host your team's business relationships in one place

- Helps you prioritise and automatically assign influence so you can focus on the relationships that matter

Relationship scoring and analytics

- Advanced scoring of relationship health for companies and their contacts; creates a metric to measure quality and engagement

- Management dashboards and reports to get a bird's eye view of your key relationships status to see which relationships need attention

Contact suggestions and account planning

- Intelligent suggestions for each user on who to contact next and what activities will strengthen relationships

- Never let a relationship slip with upcoming meetings and events with clients mapped with quick reminders for contact

No manual data entry = higher adoption

- Seamless O365 integration means all email and meetings history are automatically recorded - adopting the way you work

- Keep your contacts up to date with suggested contacts based on recent activity

Simple and powerful note sharing

- Mobile app allows for 'one touch' post meeting review and note capture

- Notes stored and shared with co-workers to ensure visibility of outcomes and collaboration

Relevant news and insights

- News feeds for all your clients so you know what is happening in their world and attend meetings prepared

- Record referrals, interests or any other data relevant information about your relationships

Remote relationship management through Microsoft Outlook & Teams

Connect with Office 365
Connect Office 365 and never have to manually record a meeting again.
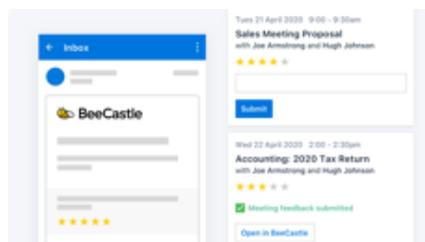
Interact from Outlook
Easily add notes and rate meetings directly from your Outlook inbox.
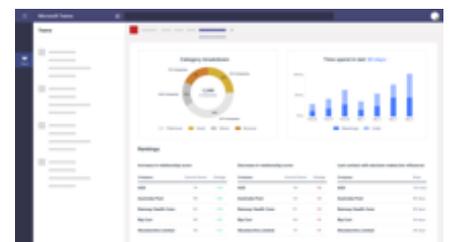
Connect with Teams
View, analyse and collaborate around relationship insights with MS Teams.

Interested? Get in touch with your preferred partner to learn more.

BeeCastle