

# Your Complete Client Care Suite

Automated tools designed to help independent businesses retain customers, save time, and grow with confidence.



# Why Client Care Matters Now More Than Ever

## The Challenge

Today's small businesses face increasing pressure: customers expect instant responses, personalized service, and seamless experiences. Meanwhile, you're juggling operations, paperwork, and growth—often without extra staff.

Manual processes drain time and lead to missed opportunities. A forgotten follow-up or delayed response can mean losing a loyal customer to a competitor.





## The Solution: Automated Care That Works for You

Our Client Care Suite handles the time-consuming tasks automatically, so you can focus on what you do best—serving your customers and growing your business.

From onboarding new clients to re-engaging past ones, these tools work behind the scenes to keep your business running smoothly and your customers happy.

# Meet Your Client Care Toolkit



## CareStart

Snap a photo of a form, and new customers are added automatically—no typing required.



## CareUpdate

Keeps customer data accurate and current with zero manual entry.



## CareReconnect

Revives dormant accounts with friendly, automated follow-ups.



## CareQuote

Delivers fast, accurate estimates that help close more jobs.

# More Tools to Power Your Business



## CareInvoice

Transforms paper or scanned invoices into organized digital data, automatically entered into your CRM or shop management system—no more manual data entry.



## CareInsight

Tracks client activity and retention trends in real time, helping you identify growth opportunities and at-risk customers before it's too late.



## CareVoice

Answers calls automatically when you're busy—greeting customers by name, taking messages, and logging everything into your CRM so you never miss a lead.

# CareStart: Effortless Customer Onboarding

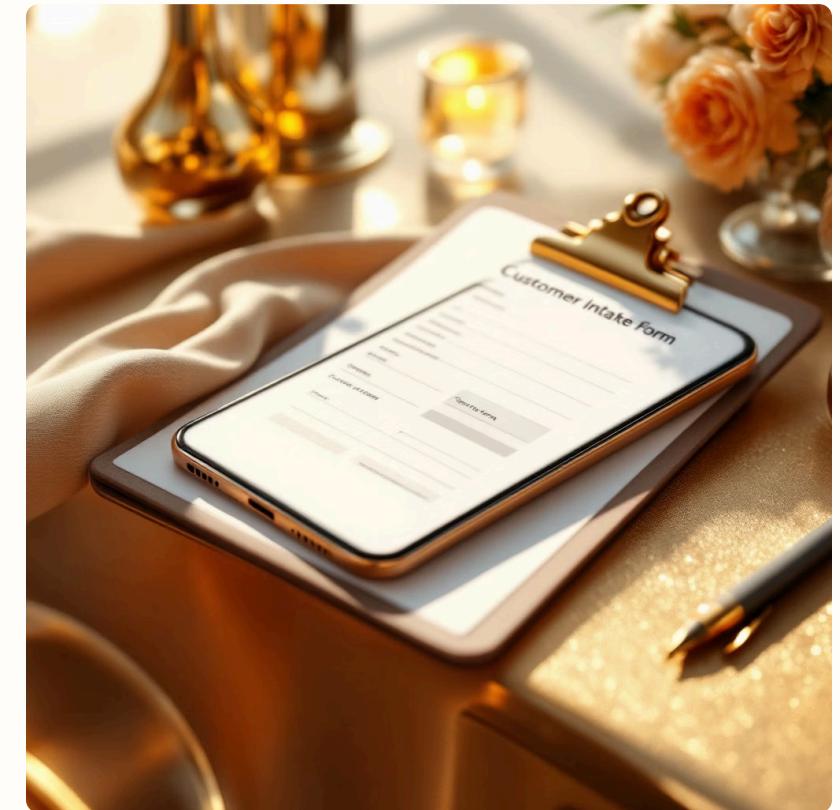
## Stop Typing. Start Growing.

Traditional intake forms mean tedious data entry and potential errors.

CareStart uses photo-based onboarding to eliminate the hassle.

**How it works:** Simply snap a picture of a paper form or document. Our intelligent system extracts the information and adds the customer to your system automatically—accurately and instantly.

Perfect for contractors collecting site info, retailers processing membership forms, or any business that handles paper-based customer details.



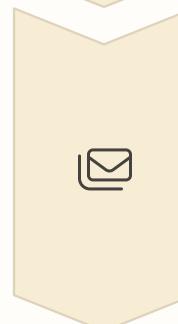


# CareReconnect & CareUpdate: Never Lose Touch



## CareUpdate

Customer moved? Changed their phone? CareUpdate automatically keeps your database current, ensuring you always have accurate contact information.



## CareReconnect

Past customers are gold. CareReconnect identifies dormant accounts and sends personalized, friendly follow-ups to bring them back—without you lifting a finger.

Together, these tools ensure your customer relationships stay strong and your revenue streams remain healthy.

# CareQuote & CareInvoice: Close Jobs Faster

# CareQuote

Speed matters when customers are comparing options. CareQuote generates fast, accurate estimates and sends professional follow-up messages automatically.

The result? You respond faster than competitors and close more jobs with less effort.

# CareInvoice

Turn paper chaos into digital clarity. CareInvoice scans and converts invoices into organized data, then enters it directly into your CRM or accounting system.

No more manual entry errors or lost paperwork—just clean, accurate records.

# Real Results Independent Businesses Are Seeing

3hrs

Time Saved Daily

Average time reclaimed from manual  
data entry and admin tasks

40%

More Callbacks

Increase in customer responses thanks  
to automated follow-ups

85%

Customer Satisfaction

Clients report faster service and better  
communication

These tools aren't just convenient—they directly impact your bottom line by helping you work smarter, respond faster, and keep customers coming back.



# Ready to Transform Your Client Care?

"Stop losing customers to manual processes. Start building loyalty with automated care that works 24/7."

Whether you're a contractor, solo professional, or small retailer, our Client Care Suite helps you compete with bigger businesses—without adding staff or complexity.

**Get Started Today**