



One space to
manage your business



Case Study of a business getting value out of myworkspace...

millennium3 (millennium3.com.au)

ING owned financial services dealer group ranked in the top 5 groups within Australia.

As a rapidly growing business, millennium3 needed a platform to manage its own business, communicate with their advisors and, where appropriate, the advisor also uses the system.

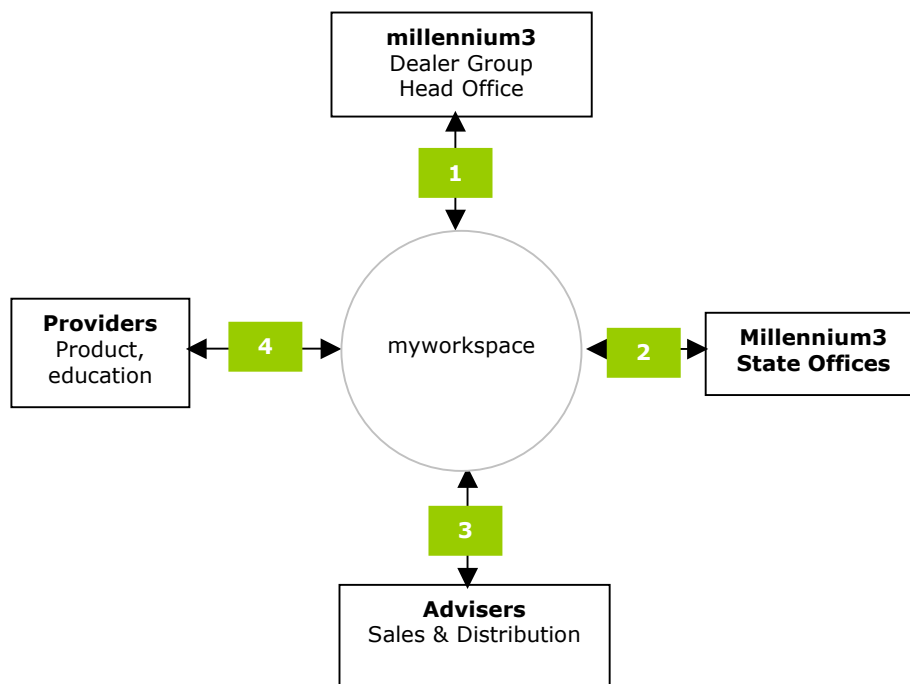
Leonard Whittaker...

I have not found anything that offers better functionality and value for money.

Key myworkspace Components Used...

- CRM
- Website
- Collect enquiries
- Email
- SMS
- Shared Diaries
- Event Management
- Manage performance
- Surveys & Polling
- Commission Management
- Documents
- Projects & Tasks
- Financial Services

How It Works





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1 Head Office

- Distribution of procedures
- Quality
- CRM
- National Website

2 State Office

- As per Head Office

3 Advisor

- Client communication & CRM
- Manage client insurance and investment records
- Practice website

4 Providers

- Knowledgebases
 - Advertising
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