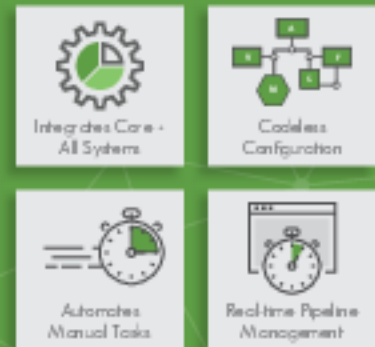


A Better CRM for Financial Institutions

SIMPLIFY WORK. DRIVE GROWTH. DELIVER ON EXPERIENCE.



CRMNEXT is a stellar CRM solution designed specifically with the needs of banks and credit unions in mind. The platform integrates your core and other existing technology under a simple, easy-to-use interface that lets you see all customer and member information and complete tasks in one place. Long gone are the days stuck behind the computer having to cut-and-paste across systems to get work done. CRMNEXT automates the boring stuff so you can focus on real-life relationships instead. More than one million financial institution employees use CRMNEXT on a daily basis to simplify work, drive growth and deliver awesome experiences to over a billion folks around the globe.



Enable Relationship Growth

The Customer 360 brings all customer data from across systems together in one place. And you can complete tasks right from the very same screen. With information at your fingertips, you can take care of business in a flash, maximizing your ability to leverage customer interaction time for relationship building.

Increase Share-of-Wallet

Match customer needs with relevant, highly personalized product recommendations that convert. CRMNEXT's algorithmic approach to cross-sell weighs multiple factors to identify the right next-best product to suggest. Pre-approved offers and fast-tracked automated processes make it easy for the customer to say yes.

Deliver Faster First-Contact Resolution

A centralized platform for all customer information - including product holdings, interactions, case histories and more - provides a holistic treasure trove of reference materials to help quickly and accurately resolve customer issues. The knowledge management portal seamlessly integrates with your document management system and guides team members to the right resources to get the job done.

Simplify Work

Drag-and-drop to create processes and workflows with straight-through processing-to core systems. Leverage automation to reduce account opening time, deliver expedient product fulfillment and eliminate manual tasks. Use guided next-best action prompts and call scripts to boost efficiency and results.

Expand Your Customer Base

Automated lead management capabilities, sales planning and forecasting tools, and a central hub for marketing orchestration help you attract and retain more customers. A single campaign interface with visual drag-and-drop tools lets you easily design assets, segment data, program workflows and measure results - so you deliver the right message, to the right person, at the right time.



For more details contact: 415-424-4644 | info@crmnext.com | www.crmnext.com