



# The CRM Platform for Banks & Credit Unions

**YOU NEED TO GROW—WE HAVE THE TOOLS TO  
MAXIMIZE YOUR TEAM'S PERFORMANCE**



Our solution goes beyond CRM, allowing you to automate marketing campaigns, target prospects with analytical intelligence, gain insight into customer profitability, and track goals and incentives, all while providing richer relational experiences that are personalized to every customer's unique needs.



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**CRM**

*Personal Relationships,  
Enhanced by Technology*

**Demonstrating that you can understand and meet customers' specific needs is critical.**

- Get a 360-degree view—see products, services, and relationships
- Leverage the power of personalized dashboards
- Track all customer touchpoints
- Build custom workflows
- Track loan past dues



Create and track pipelines



Automate your referral process



Manage and resolve service requests



Build robust reports



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Follow Up Call



Client Satisfaction Survey



Checking Cross-Sell



Online Banking Cross-Sell



## MARKETING AUTOMATION

*Scalable Personalized  
Communication*

You need the ability to scale personalized outreach and offer the right products at the right time.

- Easily mine your customer data and create lead lists
- Automate your onboarding process and other touchpoints
- Effectively cross-sell the right product to the right person at the right time
- Segment customers to personalize marketing efforts and messaging
- Create your own marketing campaigns and report on successes
- Automatically send email campaigns through seamless email marketing integration
- Prompt employees with customer-specific pop-up messages with SmartPops™



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CFO, ABC Company

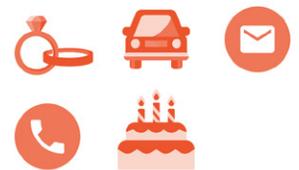
**\$500k - \$1MM** Net Worth

86 Customer

### WEALTH



### PERSONAL



## ANALYTICS

*Data Analytics for  
Better Results*



Analytical intelligence drives targeted marketing.

- Get instant access to demographic and wealth data powered by WealthEngine™
- Automatically update full database annually, and new customers daily
- Further segment customers based on true intelligence
- Increase efficiencies by focusing marketing and sales efforts on higher potential deals
- Create strategic programs for customer retention and growth opportunities

## Profitability

95

**PLATINUM**  
95th percentile

**\$163,611.82** Net Profit



## PROFITABILITY

*Understand & Grow Your Customer Relationships*

Quickly know the value of your accounts and steps to grow them.

- See customer ranking, trends, and month-to-date profitability
- Beyond just the customer's account balance, see true account profitability
- Get hard costs import from account and soft cost allocations
- Know that data is based on your cost to do business, not an industry standard
- Create retention programs around your best customers and growth programs to develop your unprofitable ones



## GOALS & INCENTIVES

*Motivate Employees to Empower Sales Efforts*

Attracting, retaining, and empowering motivated employees is essential to growing your financial institution.

- Track and reward employees for measurable goals
- See results daily
- View available payouts through employee scorecards
- Employee and management dashboards
- Customize your plan

## OTHER SERVICES

*Integrations, training, and services*

- Mobile app
- API
- Two-way Outlook integration
- Dedicated Implementation Specialist
- Phone-supported help desk
- 360 View Users Conference
- 360 View Professional Services for expert help and consulting
- Secure and convenient deployment (ASP-Hosted or Institution-Hosted)

