The CRM Built for Bankers by Bankers

The tools to build customer relationships

360view

CRM

Take Great Care of Your Customers

We designed the 360 View CRM platform to help you foster real relationships with your customers. That means knowing who they are, where they are going, and what they need. Here's how we do it:

A 360 View of Your Customer

A full view of your customer means the most complete information available across departments—like customer profiles, activities, touchpoints, and history, as well as products, services, relationships, and opportunities. For example:

- the full relationship including primary and secondary account ownership along with deposit signers, loan guarantors, and other centers of influence
- graphical representations of account data (e.g., deposits to loans)
- all outstanding work items (e.g., pipelines and incidents)
- cross-sell opportunities
- household, direct, and center-of-influence relationships

Referral Tracking

Managing and tracking referrals is a breeze with 360 View CRM. Easily create referrals directly from any customer or prospect record and send them to others in seconds. Referral creators (and receivers) can stay on track with email reminders and monitor progress to keep the process moving towards account opening. 360 View automatically closes open referrals upon new account opening without user intervention.

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> Our bank collects all this customer data, but it is in four different places. I just want to see all that information on one screen.

Pipeline Tracking

Open a new pipeline for loans or other products on any customer or prospect. Build your existing workflow into 360 View Pipelines while assigning security and close probability. Easily track progress with complete reporting so you are prepared for your next management meeting.

Activity Tracking

Record and follow up on important customer interactions and share that information with others. All activity is viewable through the dashboard, but you can also share via email with two-way Outlook integration. “Activities” can be anything from updated information gathered by a customer-facing team member to a regular sales activity that you want to track and report on.

Incident Tracking

The fastest way to customers’ hearts is to resolve their issues as quickly as possible. With 360 View CRM incident tracking, any employee can create a customer incident, and anyone with system access can assist with resolution. Unresolved incidents automatically escalate after a pre-determined period of time. This means no more manual tracking on forms or sticky notes. Ever wonder how many times your customers lost their debit cards last year or complained about customer service? Incident tracking can tell you in a standard system report.

Profile Management

Design your own profiles for business or personal customers (as many as you like!) and use them to manage financial statements, annual surveys, or any other reporting that benefits from demographic organization. You can also use the 360 View Marketing Wizard to data mine profile information simply and quickly.

Take Great Care of Your Business

We also designed 360 View CRM to impact institutional goals like growing revenue and creating a sales culture. Helping you have the right conversation at the right time with your customers, rather than product-pushing, is something we brag about. Here's how we do it:

Predictive Modeling

Use predictive modeling to see the attrition ranking of consumer and business accounts and determine if a customer is more or less likely to leave your institution. Or, find the top three next likely products desired by a customer and adjust your marketing accordingly.

Sales Automation

Use 360 View to prospect, manage contacts, work pipelines, and record to-do activities during the sales process. The change from manual management of the sales operation to 360 View's designed automation not only captures the process data, but results in a higher close rate.

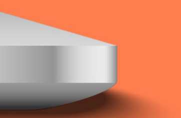
Reporting

360 View has over 150 standard reports or customize an unlimited number of your own reports. Do this simply with our easy-to-use Report Writer. You can also schedule or mark your favorite and most frequent reports for easy access.

Customizable Dashboards

The 360 View Dashboards create an opportunity for any employee to customize the content and level of detail most helpful for their individual responsibilities—what is informative to an executive is not necessarily the same for a team member. Customize the data you want to see and create as many dashboards as you like with the ability to drill down to more detailed information with a simple click.

> "We needed a tool to streamline our sales process and offer a better look at our data. The 360 View dashboards, with the ability to create your own charts and widgets and to drill down into the data, it honestly replaces the need for several reports that we use.



Marketing Automation, Analytics, Profitability

Take Great Care of Your Sales

At 360 View we know that positive customer interactions are the doorway to growing your business. We are all about helping you scale those interactions and then sharpening your analytical focus to impact the important stuff, like profitable growth and wallet share. Here's how we make it easy:

Marketing Campaign Creation and Management

Create unlimited marketing campaigns and automate them so communication is timely and reliable. Generate lists within 360 View using our easy query tool to target your campaigns and set trigger events to initiate the offers. This feature is perfect for onboarding, from welcome emails to an anniversary mailer and everything in between, but also useful for offers that promote retention and growth. Create as many offers as you want within a campaign, decide what success looks like, then measure and adjust.

SmartPops™

Create relevant live interactions with customers at the right time using our customer-specific pop-up messaging tool. Wish a customer happy birthday or offer to renew a CD that is maturing soon. With SmartPops, messages "pop" onto the employees screen prompting talking points whenever a match occurs between a customer and any active offers they qualify for. Employees can choose to make the offer and then easily create a referral directly from SmartPops.

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We need a better marketing campaign plan than, 'we decide to promote auto loans, we get a list of all our customers, we send them an email, we celebrate that we sent them an email,' and that's it.

Profitability

If you want to know which customers and accounts contributed the most to your bottom line and which of your products were most successful (and you should want to know!), you also know it's not so easy to find the answers. Profitability at 360 View shows you the value of your accounts and relationships, customer ranking and month-to-date profitability, and true account profitability among many other things. Also, it tracks historical data so you can see changes in the value of the relationship over time, and we do it with data based on your cost to do business, not some industry standard.

Cross-Sell Opportunities and Companion Product Suggestion

Create cross-sell opportunities and companion product suggestions using a variety of methods (e.g., Predictive Modeling, 360 View Marketing Wizard, any data imported into 360 View) and easily view them on the 360 View dashboard. You can prioritize cross-sell opportunities, so you offer best-fit products first and measure and improve your efforts tracking all cross-sell activity.

Market Segmentation Analysis

Go a step deeper in defining target market groups and marketing initiatives using 360 View's Market Segmentation Analysis. Collaborate with a 360 View Professional Services Consultant to identify your customer segments with the greatest potential for growth. We offer opportunity assessments based on refined data analysis and help you put it into action with marketing campaign recommendations designed to meet your goals.

Analytics

Create your own models and customer segmentation programs using the 360 View Analytics module, Actionlytics™. Access and incorporate more data around a customer to improve marketing results. Actionlytics™ gives you instant access to demographic and wealth data powered by WealthEngine™, which operates within the 360 View platform. This wealth intelligence includes customer information such as net worth, investable assets, real estate value, marital status, and more, so you can target customers with products and services relevant to their lifestyles.

Here's what a marketing campaign looks like with automation.

1. Create dynamic lists that are updated daily based on targeted criteria or filters
2. Schedule and auto-send marketing emails to targeted lists
3. Automate follow-up emails and additional touch points based on prior behavior to stay in touch
4. Support your staff with automated conversation prompts based on triggered lists

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We used to track our employee goals in a spreadsheet, but to automate our process and see progress daily—even quickly see pay-outs—that's been a game changer.

Goals & Incentives

Take Great Care of Your Employees

Plenty of financial institutions operate with a basic CRM platform. 360 View goes beyond the basics to help you incentivize employees. Offering a tool for planning and tracking goals helps your team stay motivated and reach success. Here's how we help:

Goals & Incentives

Setting clear goals and creating incentives is part of the formula that helps retain great employees. Take the next step and have the 360 View Goals & Incentives module automate and track daily progress for your team members. Knowing where they are and where they are going is motivating as employees reach for goals. Also with automation, the Goals & Incentives module saves a significant amount of time you might spend manually tracking your program.

Other Services

360 View Takes Great Care of You

When you look for a CRM provider, find one that wants an ongoing client relationship and partners with you through thick and thin. At 360 View we walk the talk and offer a variety of support services. It is our full intention to go the extra mile with you. Here's how we do it:

Training and Support

At 360 View we care about your success using our platform. We promise to not drop off our software and head to the next sales call. From being present through implementation where we offer best practice advice and ease the transition, to being the capable long-term partner who offers you time, commitment, and support through the life of the partnership, it's one of the things we do best. Not to mention we offer project management, onsite group training, internet training/help, phone support, an online user forum, on-demand video training, and a client-favorite users conference for learning and networking.

Professional Services

For more involved assistance, 360 View Professional Services is available and offers CRM strategies, outsourcing for CRM administration, CRM mentorship, general consulting, and more. Whether you are new to CRM and need expert assistance or a long-time customer looking to take on a new module or relaunch your product, we have something for everyone and for every budget.

360 View API

For integrating with any of your third-party systems, 360 View has an Application Programming Interface (API), using the OpenAPI Specification (OAS), which allows you to add or update main CRM objects like customers, accounts, referrals, incidents, pipelines, and activities.

Deployment (ASP Hosted or FI Hosted)

360 View's software is conveniently deployed through an SSAE16 Compliant Application Service Provider (ASP) providing remote Internet access and hosted in the cloud in advanced and secure technological facilities. We have given the highest consideration for data privacy in accordance with all governmental regulations concerning financial institutions. All software distributed over the World Wide Web is encrypted with SSL encryption.

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I have been involved in many implementations throughout my career, and 360 View is the best from the standpoint of vendor participation, guidance, and preparation.

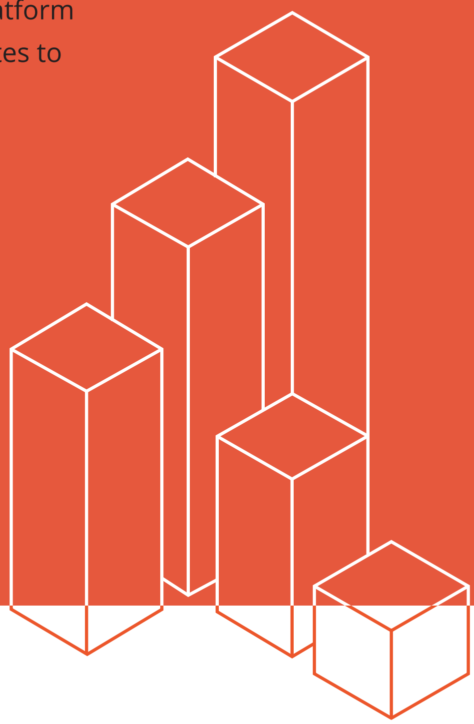
About Us

With over 20 years of success serving financial institutions, 360 View brings experience and relationship knowledge to the table. Our CRM platform is a powerful and user-friendly solution that provides a full 360-degree view of your customer. Other CRM platforms might make similar claims. Here's how we're different:

Industry-Specific—As one of the first CRM's built specifically for banks and credit unions, here at 360 View we have been eating, drinking, and breathing banking from the beginning. In fact, even today, it is all we do. As former bankers, we understand you and your customers and have invested more than two decades in a product uniquely suited for financial institutions.

Core System Integration—We built 360 View to play well with others and to be portable. Our platform integrates with all core systems, which makes for simple and successful integration. In addition, if you decide to change core systems, your CRM data goes with you.

Enterprise-Wide Solution—When you partner with 360 View, our CRM platform is available throughout your institution. No per-seat license fees translates to accessibility, scalability, and transparency in pricing.



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