

360view

PROFESSIONAL SERVICES



CRM Strategy

Identify the overall CRM objectives and develop a strategy to achieve those objectives.

- Discovery meeting
- Review CRM setup
- Results presentation
- Next steps



Mentorship

Advanced one-on-one web-based training.

Marketing Mentorship

Program tailored to financial institution's marketing initiatives, not limited to the following:

- Query Customer & Account Wizard lists
- Build campaign offers
- Automate email offers via integration with Constant Contact
- Track success measures
- Create reports to track results

CRM Mentorship

Mentor new CRM Admin to manage the CRM from setting up all parameters to developing the marketing module.

360 View Professional Services offers you the guidance to take your CRM to the next level. 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.



Consulting Services

Assistance with the development and rollout of a new module and processes within the institution.

Incident Development

Streamline maintenance requests throughout the financial institution.

Pipeline Development

Lending sales cycle management and tracking.

Report Writer Consulting

Assistance with building reports tailored to the financial institution's needs.



Outsourced Admin

Retainer program working as an extension of your internal team.

CRM Admin

- Administrator of full CRM remotely

Marketing Admin

- Develop, launch, and manage marketing campaigns remotely

Implementation

- Implement all areas of 360 View from financial institutions' perspective



Marketing Campaigns

Build marketing campaigns in financial institution's database.

- New client onboarding journey
- SmartPops offers
- Multi-offer campaigns



Market Segmentation

Data analysis to identify segments with greatest growth potential, allowing you to implement target marketing with customer-centric journeys.

- Analysis of Market Segmentation Reports:
 - Financial Behavior by branch
 - Cons & Bus Product Mix by branch
 - Overall branch statistics
- Complete opportunity assessment
- Put the analysis into action based on institution results



Dashboards

Configure dashboards to include the institution's most valuable KPI elements.

- Dashboard layouts may include:
 - Executive Dashboard
 - Branch Level Dashboard
 - Commercial Lending Dashboard
 - Marketing Scorecard Dashboard

WHY 360 VIEW PROFESSIONAL SERVICES?

Expert Users

Our users can offer guidance on the best way to set up your CRM to fit your needs.

Time Saver

Our services save you time by expediting the process of achieving your CRM goals.

Confidence

We give you confidence in knowing that the system is set up correctly.

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The Professional Services team has been great for adoption of our CRM tool – they deliver both a crash-course and long-term learning that helps bank marketers get up to speed with the industry, software, and behavior. We've been able to build, release, and promote use of pipelines, incidents and full-scale marketing campaigns directly as a result 360 View's Professional Services.

Equity Bank

CRM Mentorship Program

The Professional Services team has truly been an asset to the success American Bank has with our 360 View CRM system. American Bank would not be where we are today with the CRM without their expertise, patience and guidance.

American Bank

Implementation & Marketing Mentorship Program

We wanted to build a pretty expansive onboarding campaign for new retail clients, so enlisted 360 View's Professional Services to help us with the project. What a great partnership! They stayed by our side every step of the way, and they never missed a beat from call to call! As part of the build, we incorporated various success measures, so we always know how the campaign is performing. This is great tool for me and my Executive Team. Anytime problems arise, Professional Services make themselves available to help. Their 360 View expertise and customer service is exceptional.

First Bank of Carmi

Marketing Mentorship Program

Meet Our Experts



ELYSE RICHMANN

With 25 years in the financial services and software industry, Elyse's banking experience spans Retail Management, Marketing, Operations and CRM Implementation. As 360 View's Director of Professional Services,

she specializes in developing marketing automation campaigns, customer journeys, market segmentation, and helping financial institutions achieve success with their 360 View CRM.



KATE HARRIS

Pairing her bank marketing knowledge and experience in managing 360 View CRM, Kate has nearly 11 years of expertise in utilizing customer data to shape marketing strategy. From brainstorming campaigns to

calculating marketing ROI and impact, she understands the importance of having access to accurate data.

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For Banks & Credit Unions

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