

# How 360 View CRM Can Track and Streamline Your Sales Process Across Business Lines

360



Sam speaks with the institution's Customer Service Rep John about a new home loan.



John creates a referral on Sam's record in 360 View CRM and assigns it to the mortgage team.

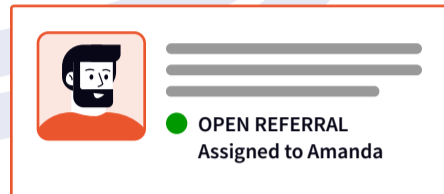


The mortgage team receives an email notification about a new referral and can see the open referral for Sam in 360 View CRM. Amanda is assigned the referral.

Amanda



Amanda contacts Sam to learn more about what he needs and how she can help.



Amanda creates a new pipeline from the referral on Sam's record in 360 View CRM.



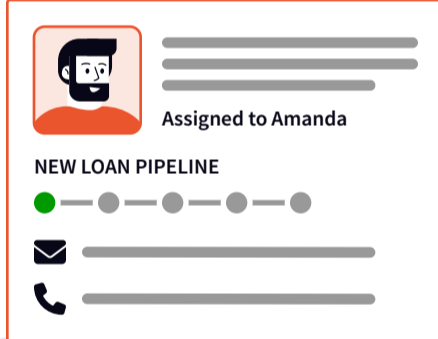
Reports and widgets are available for full department reporting based on vendors, pipeline amounts, status, funding, etc.



Amanda engages with Sam and logs all touch points in the CRM. She can track statuses, amounts, dates, funding, etc based on the workflow process created by the institution. She can also set reminders and assign tasks to other departments to keep the process moving.



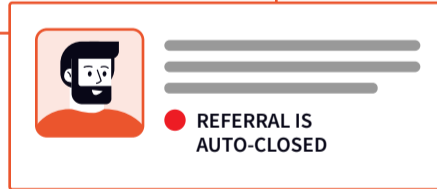
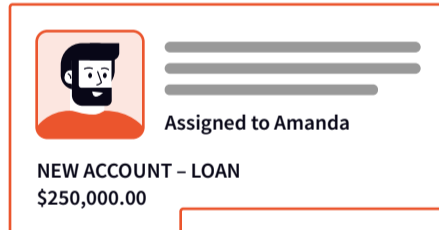
Other departments, such as Loan Operations, Underwriting, or Credit Risk, can view and update the pipeline as needed.



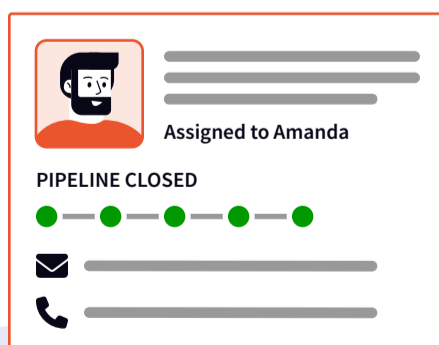
Everyone at the institution can see Sam's CRM record and get the most up-to date information related to the sales process.



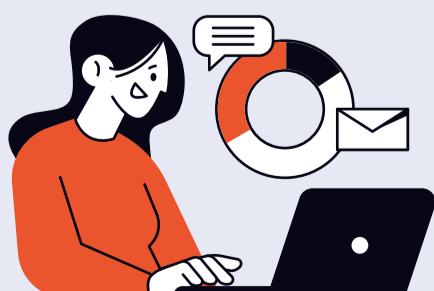
Once the loan is booked, the new account is imported into 360 View CRM from the core banking system and the original referral is auto-closed.



John who created the original referral is notified and the referral is tracked as part of the institution's incentive program. John is one step closer to meeting his goals.



Amanda continues to update the pipeline with after-closing information. The pipeline is closed at the end of the process.



## Building the Relationship

Follow-up activities are assigned to a Customer Service Rep to check in with Sam and ensure he is happy with his financial services. 360 View CRM recommends next best products when Sam qualifies for specific marketing campaigns. The institution becomes a trusted advisor and a vital part in Sam's financial journey.