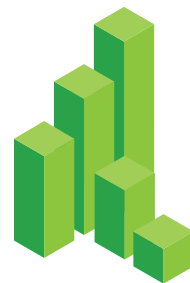
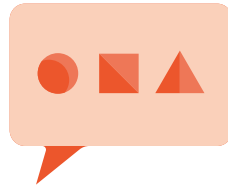


Introducing

The Growth Platform for Banks & Credit Unions

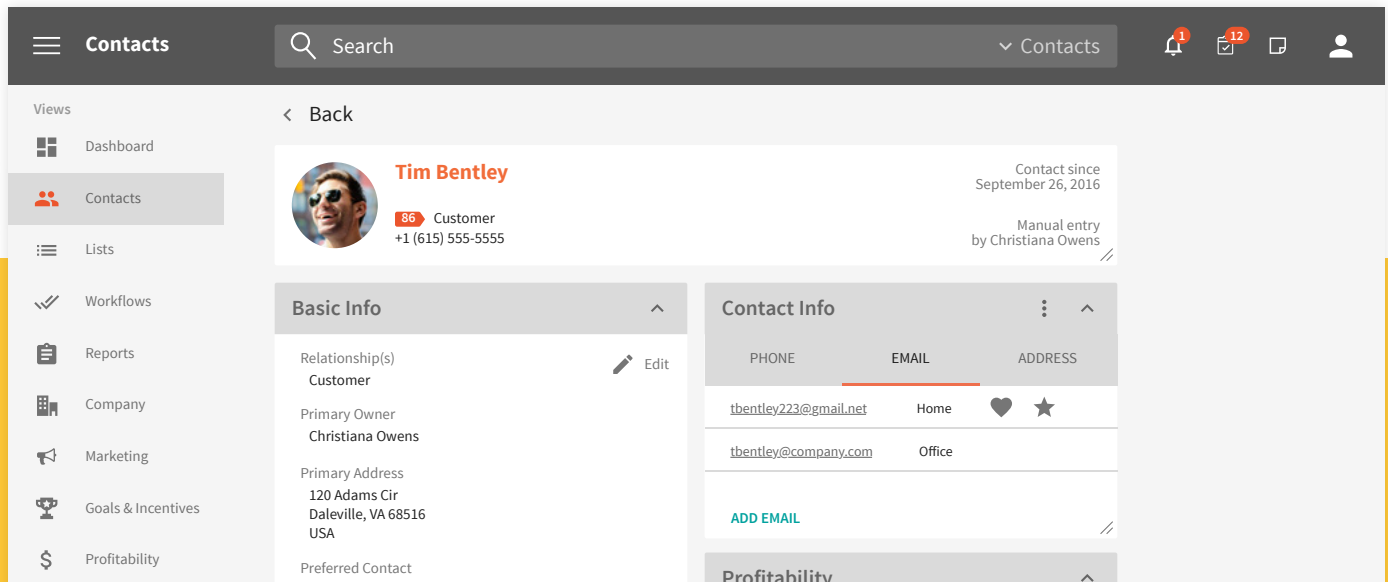
**YOU NEED TO GROW—WE HAVE THE TOOLS TO
MAXIMIZE YOUR TEAM'S PERFORMANCE**



**The Growth Platform
For Banks & Credit Unions**

CRM | Marketing Automation | Goals & Incentives | Profitability

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



●●● CRM

*Personal Relationships,
Enhanced by Technology*

Demonstrating that you can understand and meet customers' specific needs is critical. Empower organizational growth by providing a richer relational experience.

- Get a 360-degree view—see products and services, relationships, profitability and more
- Manage unlimited relationship types such as vendors and employees
- Track all customer touchpoints
- Leverage the power of personalized dashboards
- Build custom workflows
- Create and track pipelines and referrals according to your organization's standards
- Manage and resolve service requests according to your organization's standards
- Track loan past dues
- Enjoy robust reporting



LEROY MILES

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Follow Up Call



Client Satisfaction Survey



Checking Cross-Sell



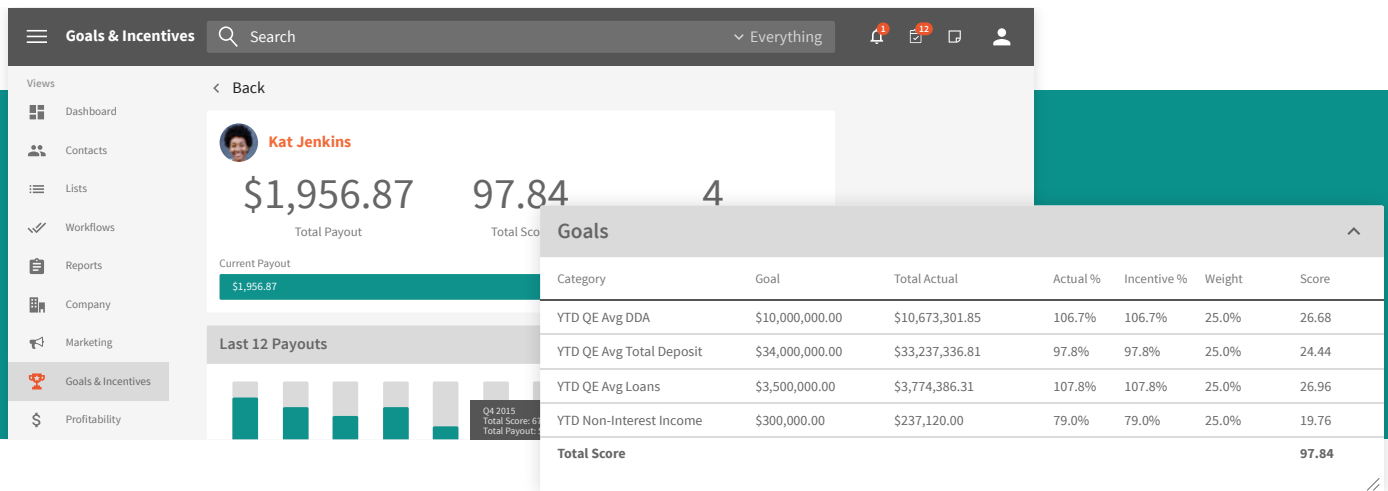
Online Banking Cross-Sell

▲●■ MARKETING AUTOMATION

*Scalable Personalized
Communication*

You need the ability to scale personalized outreach and offer the right products at the right time. By using data-driven automation you can empower effective cross-selling and target marketing communications.

- Easily mine your customer data and create lead lists
- Automate your onboarding process
- Effectively cross-sell the right product to the right person at the right time
- Segment customers to personalize marketing efforts and messaging
- Automate touchpoints to help bankers stay in touch with their customers
- Create your own marketing campaigns and report on successes

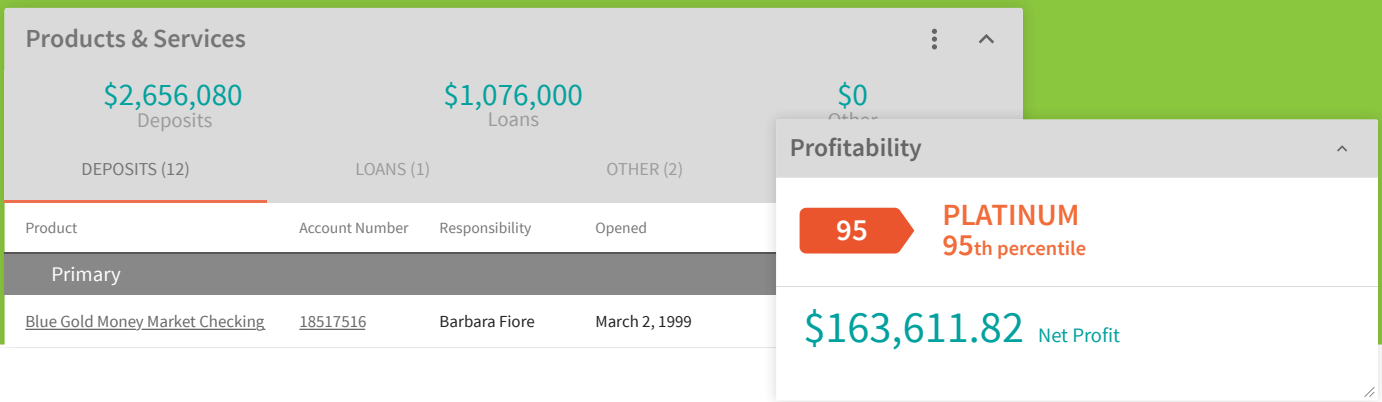


📍 GOALS & INCENTIVES

*Motivate Employees to
Empower Sales Efforts*

Attracting, retaining, and empowering motivated employees is essential to growing your financial institution. With 360 View you can track and reward employees for measurable sales goals.

- Track and reward employees for measurable goals
- See results daily
- View available payouts through employee scorecards
- Customize your own plan or let us create a plan specific to your organization

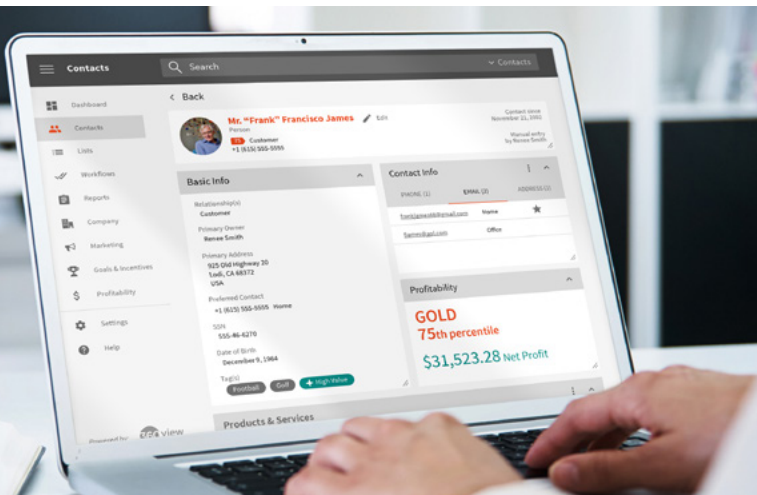


PROFITABILITY

Understand & Grow Your Customer Relationships

Without a full view of relationships and profitability, your staff is not equipped to build trust and seize cross-sell opportunities. Quickly know the value of your accounts and steps to grow them.

- Quickly know the value of your accounts and household relationships
- 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
- See a customer's value over time
- Create retention programs around your best customers
- Build growth programs to develop your unprofitable customers



With superb customer support, we are here to help you from implementation to seasoned user.

For more information or to schedule a consultation visit 360view.com.



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