



A better CRM solution for financial institutions.

Designed to meet the unique needs of banks and credit unions.

Integrates core and all systems

Simple, easy-to-use interface

Real-time pipeline

All customer data in one place

More than **1 million financial services employees** use CRMNEXT on a daily basis to simplify work, drive growth and deliver awesome experiences to over 1 billion customers.

SIMPLIFY WORK

60%

Increase in productivity

75%

Decrease in account opening time

80%

Faster integrations

Streamline Work

Eliminate screen-hopping, automate tasks, auto-populate forms and visually design workflows with drag-and-drop ease, thanks to complete integration of core and all other systems.

"CRMNEXT is the total package for banking CRM. We wanted a product that would replace multiple systems and simplify processes so we could focus more on customer engagement."

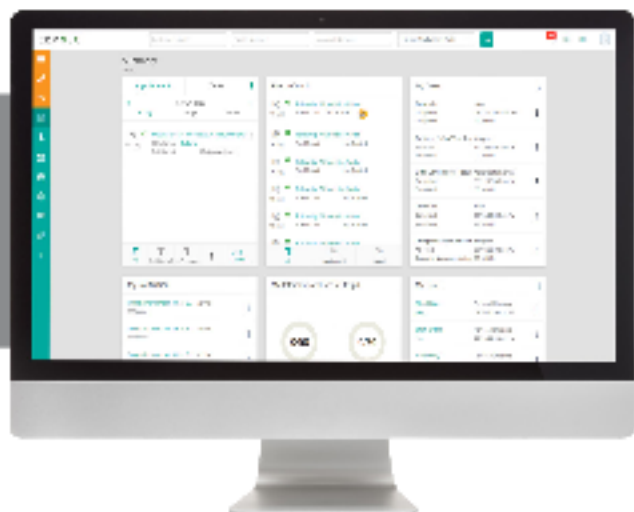
- EVP of Digital Banking



Increase Productivity

Automated processes and workflows let you get more done, faster. Open an account in less than 10 minutes, build a dashboard in under two, and issue a credit card or create a lead in 30 seconds flat.

"CRMNEXT's bank-in-a-box workflows are thoughtfully designed to address sales and service management requirements in a financial services company. We have been able to completely digitize our customer onboarding process." - AVP



Centralized Employee Workspace

One place to go for all tasks, leads, reminders and follow-ups for the day; fully customizable by employee role and preferences.



DRIVE GROWTH

40%

Increase in
bottom-line revenue

80%

Decrease in sales
turn-around time

50%

Increase in
cross-selling success

Lead Management

Qualify leads based on custom-defined parameters to assign and prioritize. Ensure every lead is pursued with automated allocations, qualification scripts and customized workflows.

"CRMNEXT has been able to align our thinking and approach in a single execution platform. Its automation of processes and smart planning of activities have helped us to increase both wallet and market share." - CEO

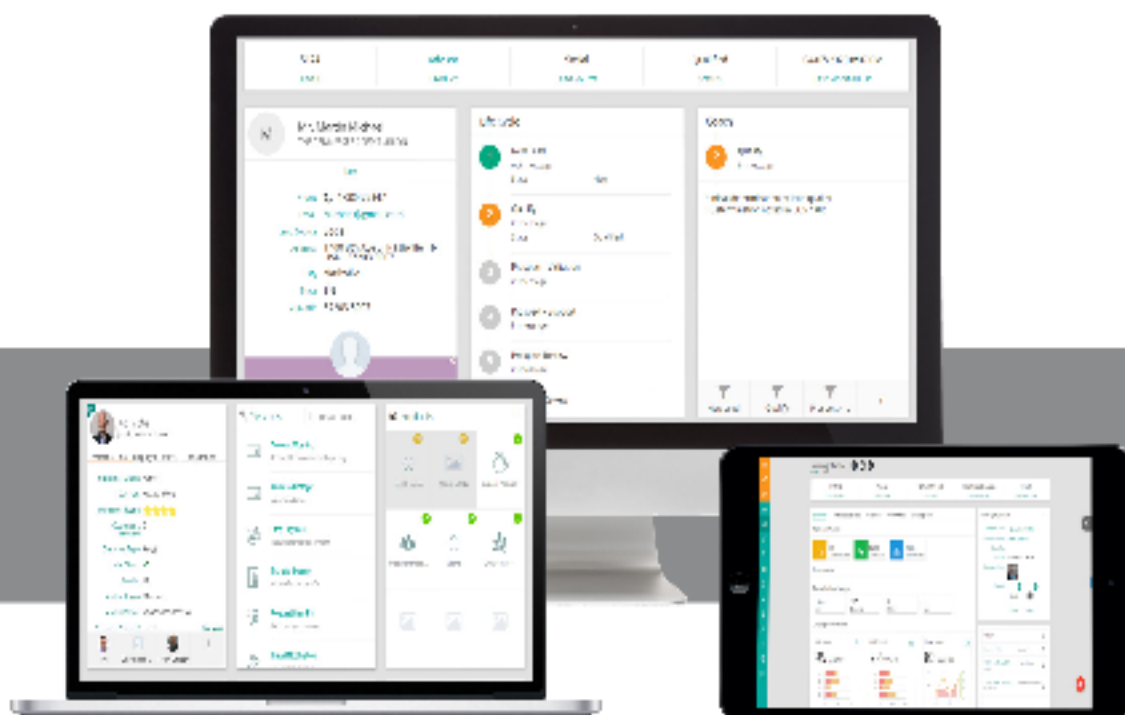
Cross-Sell

Multiple analytics models determine the next-best product to recommend and pre-qualify offers, so it's easier for the customer to say yes.

"CRMNEXT gives both a holistic overview of the customer relationship and granular details. This allows sales interactions to be focused, quick, and perhaps most importantly, poignant to the customer. The next-best product recommendation feature is intelligent, which reduces sales fatigue on both the customer and our team members." - AVP

Marketing Campaigns

Design templates, segment data, implement initiatives and measure effectiveness all from a single interface. Leverage customer insights to deliver the right message at the right time, converting leads faster.



DELIVER ON EXPERIENCE

60%

Increase in Net Promoter Score

90%

Decrease in service interaction time

100%

Referenceable customer base

Case Management

Reference complete case and interaction history to better address customer needs. Resolve cases faster with straight-through processing for common requests. No need to change screens to complete task.

"CRMNEXT empowers branches to deliver faster sales and customer service. The platform was easy to configure and integrate with our core systems, providing end-to-end process visibility for our customer facing teams."

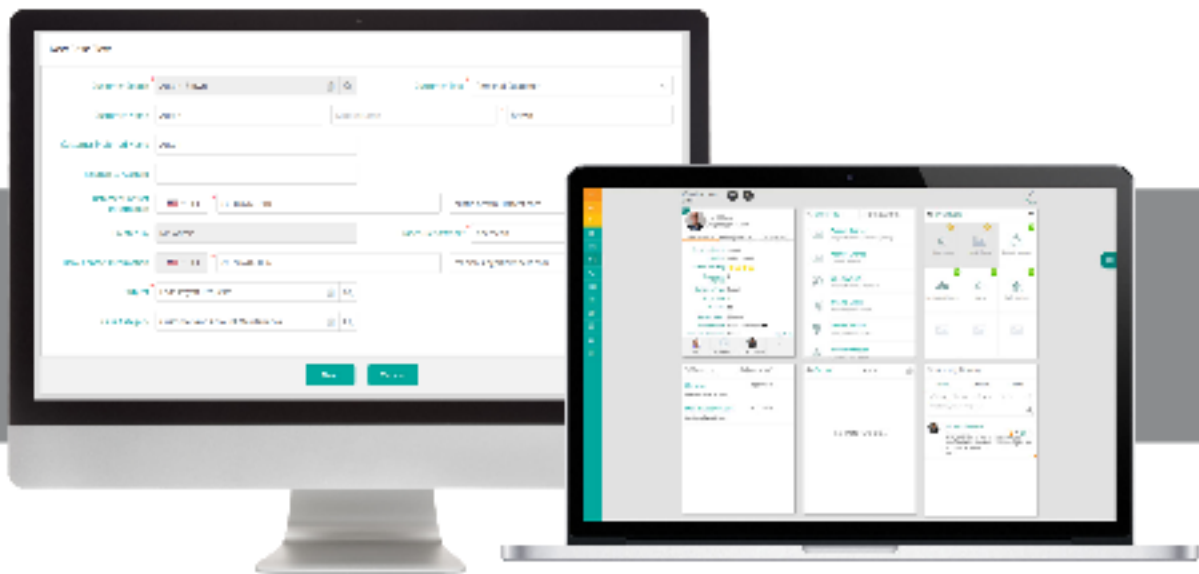
- Assistant General Manager

Universal Banker

No more waiting for the right person to help a customer. A single platform for everything and everyone empowers any employee to address all needs without hand-offs to different departments.

"With CRMNEXT we have been able to successfully bring together all processes related to the customer relationship - including sales, services, campaigns, and performance management - across all physical and digital channels on a unified, agile platform."

- Head of Strategic Projects



Customer 360 View

Consolidates all customer data in one place. Provides superior insights on product holdings, wallet share, interactions, behavior and lifestyle info to personalize each customer's experience.