RETAIL BANKING

SIMPLIFY WORK. DRIVE GROWTH. DELIVER ON EXPERIENCE.

Putting the
Relationship
back in CRM

Amazon, Uber, Netflix and others have recalibrated consumer expectations for on-demand , personalized service, customized offerings and greater control over their product experience. Yet, today's financial institutions often have a hard time keeping up. CRMNEXT empowers all bank and credit union employees to deliver awesome experiences that meet and exceed the highest expectations.

HOW?

FUNCTIONAL OVERVIEW

Sales Management

- Lead Management
- Account Management
- Contact Management
- Opportunity Management
- Offer Management
- Multichannel Lead Capture
- Assignments & Routing
- Alerts & Escalations
- Customer Organization Charts
- Sales Coaching
- Cross-sell Management
- Tasks & Calendar
- Internal Collaboration Engine
- Knowledge Management
- Document Management
- Target & Forecasting
- Team Management
- Deduplication
- Multi-level Territory
- Process & Workflow Designers
- Forms & Layout Designers
- Integration Designer
- Reports & Dashboards
- Mobility
- AI-powered Scoring
- AI-powered Insights
- Digital Customer Journeys
- ML & NLP Bots-based Support

Marketing Management

- Campaign Designer
- Template Management
- Static & Dynamic Target Lists
- Budgets & Expenses
- Offer Management
- Multichannel Campaigns
- Lead Capture & Assignments
- Campaign ROI Tracking
- Conversion Tracking
- Reports & Dashboards
- Predictive Modelling
- AI-powered Insights

Performance Accelerators

- Sales Planning & Forecasting
- Cross-sell Modeler

Business Process Designers

- Automated Workflow Designer™
- Screenflow Designer™

Customer Service Management

- Multichannel Case Capture
- Case Management
- Case Routing
- Case Escalation
- Knowledge Management
- Templates
- Auto-response
- CTI Integration
- Training Management
- Data Leak Protection
- Mobility
- Internal Collaboration Engine
- AI-powered Insights
- Reports & Dashboards
- ML & NLP Bots-based Support
- Digital Customer Journeys

Codeless Configuration Toolbox

- Custom Fields
- Custom Objects
- Custom Layouts
- Active Cards
- Alerts & Escalation Engine
- Assignment Rule Engine
- Reports & Dashboards Designer
- Teams Management
- Territory Management
- Products Management
- Roles Management
- User Management

Social Media Management

- Twitter Integration
- Facebook Integration
- Linkedin Integration
- Lead Capture
- Case Capture
- Contact Capture
- Response Management
- Reports & Dashboards

Enterprise Integration Engine

- Real-time Integration Engine
- Batch Integration Designer
- Web APIs
- Messaging Queues

Blend the power of simplicity
and AI into faster sales

Instead of seeking customers for products, find products for customers. CRMNEXT delivers dynamic intelligence on-the-fly for relationship managers to match relevant up-sell and cross-sell opportunities with customer needs and boost loyalty with profitability.

Faster Sales Cycle with Lead Scoring

CRMNEXT delivers an end-to-end digital journey for faster processing of leads captured from multiple sources including website, email, branch visits, etc. The platform automatically scores leads based on multiple predefined and customizable parameters so sales teams can prioritize actions. Leads are auto-assigned/routed with intelligent rules based on skills set and expertise. Relationship managers can also manually capture leads and conduct seamless prospecting with context-based coaching tips and action prompts at every lead stage to increase closure rates. Sales teams and relationship managers are now able to instantly access prospect intelligence at point of interaction.

## Guided Cross-sell with Personalized Offers and Playbooks

CRMNEXT displays personalized offers and insights determined by algorithm techniques like frequency scoring and whitespace analysis and leverages guided call scripts and playbooks to increase the probability of conversions. Real-time alerts provide event-based triggering such as large deposits and channel usage, laying the foundation for building a meaningful relationship.

Usability Powered by Artificial Intelligence

CRMNEXT puts the power of AI in the palm of your hand. CRM functionalities use machine learning to drive actions with exponentially more effective outcomes over time. Daily tasks are more productive with real-time insights and AI-based nudges to achieve your targets.

90% Customers rate personalized and value-enhancing services as more important than anything else.
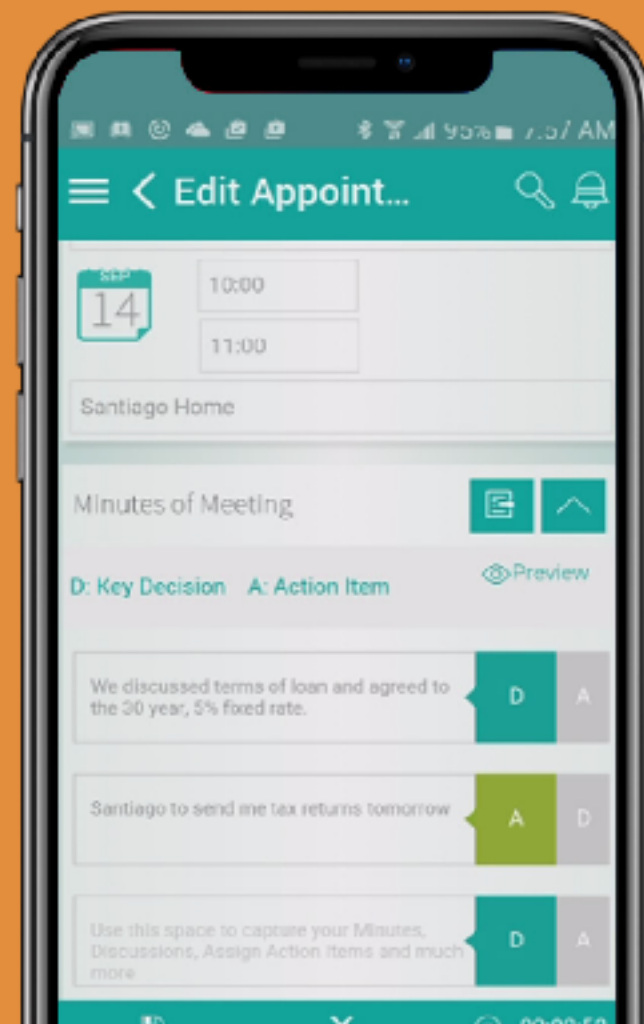
CONTACT CENTER to
TRUSTED BRANDS

An incredibly simple and intuitive interface, best-in-class user experience and profitable customer interactions are just some of the things that make CRMNEXT one of the most popular banking CRM platforms worldwide. Instead of being an unwieldy cost center and drag on performance like some solutions, CRMNEXT provides the potential to extend customer service into a profit center.

Intelligence-driven Customer 360⁰

CRMNEXT integrates the core and all other systems to provide complete and actionable customer profiles. The Customer 360 view brings together all customer data in one place - including product holdings, transactions, interactions and engagement analysis - to deliver real-time customer intelligence.

Integrated Service Desk

CRMNEXT empowers service teams to assist customers in real-time with auto-populated information, up-to-date customer profiles, on-demand video and text chatting, screen-sharing and call-assignment features that automatically route calls to available support personnel. Teams can also implement CRMNEXT's predictive dialing and interactive voice response capabilities. Seamless system integration eliminates screen hopping and enables first-time case resolution - all from a single platform.

High First Contact Resolution Rate

CRMNEXT's centralized platform for all information including product holdings, data from multiple systems, interactions, past cases, solutions and more provides a holistic treasure trove of reference materials that help service agents quickly and accurately resolve customer issues immediately. CRMNEXT's knowledge management portal and seamless integration with the document management system guides agents to the right service collateral to get the job done.

Omnichannel Continuity

Guarantee that no case context or dialogue is lost when customers switch between channels - be it self-service, web, social, chat or mobile. Support staff can seamlessly transition with customers as they as switch between proactive outbound communication and inbound service queries
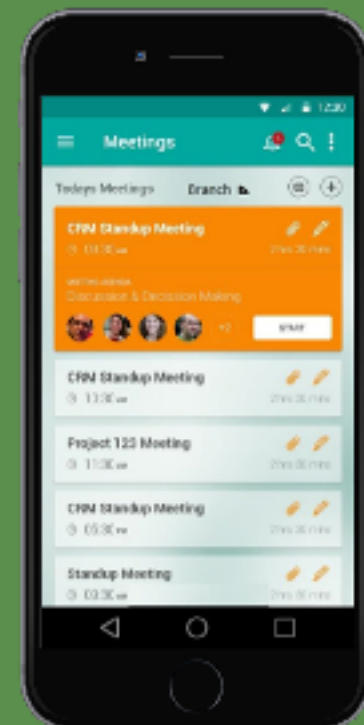
90% Customers rank faster, first-touch resolutions as their as **#1 criteria** for brand referrals.

Attract and Retain Customers

With brands across all industries battling each other for mindshare, it's critical to be able to execute laser-targeted, high-impact and insight-driven campaigns personalized to the individual across all touch points. CRMNEXT's single campaign interface with visual drag-and-drop tools makes it easy to design assets, segment data, program complex logic, implement multichannel campaigns and measure results - so you can deliver the right message, to the right person, at the right time.

KEY FUNCTIONALITIES

Segmentation and target lists	Campaign designer	Campaign execution	Content management	Campaign analysis
• Dynamic target list	• Omnichannel flow designer	• Omnichannel execution	• Smart words powered by AI	• Budget and expenses
• Static target list	• Template management	• Lead scoring	• Centralized library	• ROI analysis
• Detailed Segmentation	• Multiwave campaigns	• Response management		• Reports and dashboards

Making Campaigns More Effective

Right transactional messaging at the right moment

CRMNEXT empowers you to create and deploy real-time messaging in response to any event or customer action.

Make customer profiles richer

Drill-down segmentation to a single customer with profile enrichment through seamless multi-system integration of bank data and third-party information.

Intelligently build personalized emails without HTML coding

Create compelling content tailored to each customer with a codeless drag-and-drop structure. Define personalization, add title, links and backgrounds, etc. Plan and set custom delivery schedule.

Target audiences of different languages and regions in a single workflow

Automatically segment and target customers in their preferred language. CRMNEXT's multilingual delivery lets you engage customers in any language without creating different delivery flows for each language variant.
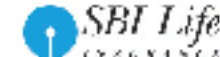
Avoid contact fatigue by optimizing communication

Curb email marketing fatigue by creating limits for individuals and applying them to delivery workflows across channels. Extract and share insights with CRMNEXT's powerful dynamic reporting, visually rich dashboards, and drilled-down campaign analytics. Customize and automate stakeholder reports on a one-time or recurring basis.

WORKING WITH THOUGHT LEADERS GLOBALLY

SBI — World's Largest CRM Implementation
325,000+ Users | Across 19 Countries

ICICI Bank

BDO

ARAB BANK

Dupaco

HDFC BANK

Danamon

ADIB

Pfizer

IDFC

SECURITY BANK

NBO

TATA AIA LIFE

AXIS BANK

TPBank

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RELIANCE

ADIRA FINANCE

EXIM BANK

MAX LIFE INSURANCE

SBI Life INSURANCE

CRMNEXT