eVerge Group's Accelerated Financial Services CRM Implementation Solution

Financial Services CRM

COMMERCIAL BANKING

What is Financial Services CRM for Commercial Banking?

eVerge Group has developed a CRM OnDemand solution specifically designed to address the unique needs of commercial bankers. Challenging market conditions are driving the need for more complete, timely and insightful information on a bank's current customers. Commercial banks require more efficient sales and marketing tools in order to acquire and grow new customer relationships.

Through a hosted solution, integrated with core banking applications, banks can now have enterprise-class Oracle/Siebel CRM technology, which enables them to achieve their customer-focused strategies with rich banking functionality, a low monthly cost, rapid deployment and a proven customer deployment model.

The key benefits of this solution include:

- Single and actionable 360° view of your customer
- Configurable to meet the needs of commercial and small business banking models
- Integration with your bank's core processing systems
- Pre-built business process automation and flexibility to configure more as needed
- Initial data loads from 3 separate source systems populate your CRM system and pre-built data warehouse
- Data warehouse to support real-time and historical business analysis
- Scheduling and prerequisites to ensure that you know what to expect once eVerge Group consultants arrive
- Predictable implementation cost, as well as reduced implementation time, complexity and risk
- Ease of use that drives adoption and simplifies compliance

Benefit from eVerge Group's proven banking expertise to rapidly implement CRM in your bank. Our Financial Services CRM solution is designed to provide a rapid and cost-effective implementation of CRM, allowing you to deploy a flexible, easy-to-use and powerful sales and marketing tool.

eVerge group

eVerge Group
4965 Preston Park Blvd.
Suite 700, Plano, TX 75093

972-608-1803
888-548-1973 (Toll Free)
www.evergegroup.com

ORACLE Platinum Partner

Components and Deliverables of the Commercial Banking CRM Solution include:

Commercial Banking Custom Fields for:

- Customers (15 fields)
- Contacts (15 fields)
- Financial Accounts (150 fields)
- Leads (30 fields)
- Opportunities (75 fields)
- Service Requests (10 fields)

Commercial Banking CRM OnDemand Business Process Automation:

- Commercial Onboarding Follow-up process (i.e. 3-3-3 program)
- Opportunity Team Assignment emails with embedded record link
- Opportunity-New Account Reconciliation
- Wholesale/Retail Lockbox Processing
- Loan Maturity Management
- Dormant Account Management & Analysis
- Account Profiling Processes

Incentive Compensation Analysis & Tracking

- Custom variables for Revenue Entry
- Multiple entry fields for varied product groupings (up to 40)
- Lock down rules based upon opportunity status
- Minimum Value Requirements Warning

Product Hierarchy Definition

- Product Mapping from core processing system into the OnDemand application
- Includes Creation and Mapping of Category and Parent Product Levels

Financial Account Summary for:

- Customers
- Contacts

Multiple Commercial Banking Page Layouts:

- Customers /Relationships
- Contacts
- Leads
- Opportunities
- Financial Accounts

Commercial Banking CRM OnDemand Reporting:

- Executive Reporting
- Incentive Compensation Reporting
- Relationship Management Reporting
- Pipeline Reporting
- Productivity Reporting

Integration Strategy for Periodic Batch Data Loads:

- Recommendations for entity load processing of large data volumes
  - Parallel processing threads
  - “Changes Only” record level loads
  - “Changes Only” field level loads
  - Error recording and handling techniques
  - Rerun and Reprocess techniques
- Documentation for various data load scenarios with resolutions
- Optional offering of pre-built ETL processes

For more information, or to schedule an application demo, contact Jason Hillner on (972) 398-5918 or at hillnerj@evergegroup.com