

Financial Services CRM

RETAIL BANKING

What is Financial Services CRM for Retail Banking?

eVerge Group has developed a CRM OnDemand solution specifically designed to address the unique needs of the Retail Bank. Challenging market conditions are driving the need for more complete, timely and insightful information on a bank's current customers. The Retail Bank requires 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
- Role-specific dashboards that help you manage individual and branch performance against goals over time
- Integration with your bank's core processing systems
- Pre-built business process automation and the flexibility to configure more processes as needed
- Lead and referral management, including a simplified lead capture process at the teller line
- 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.

Components and Deliverables of the Retail Banking CRM Solution include:

Banking Specific Fields for:

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

Financial Account Summary (Total Footings embedded analysis) for:

- Customers
- Contacts

Multiple Retail Banking Page Layouts:

- Customers (Individual, Business, Other)
- Contacts (Customer and Prospect)
- Leads
- Opportunities (Retail, Commercial, Small Business, Investment, Treasury)
- Financial Accounts (Checking, Savings, Loans, CD, IRA, Credit Card)

Retail Banking CRM OnDemand Reporting (in addition to the 48 standard reports which ship with the product):

- CD Maturities (drilldown through 2 levels to individual records)
- Loan Maturities (drilldown through 2 levels to individual records)
- Monthly Loan Report by Product/Branch/Balance
- Banking Pipeline Analysis (drilldown through 2 levels to individual records)
- Open/Closed Account Analysis (drilldown through

2 levels to individual records)

- Product “Whitespace” Analysis
- Top 10 Contacts by Bank/Region/Branch
- Top 10 Customers by Bank/Region/Branch
- Top Performers List
- New Accounts Opened by Branch/Representative
- Service Requests Analysis by Type
- Branch Scorecard Reporting
- Book of Business Analysis by Account Type

Retail Banking CRM OnDemand Business Process Automation:

- Retail Onboarding (New Account Opening) 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

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@evergroup.com