

Financial Services

Expere[®] and CRMNEXT Integration

A complete set of tools for creating, managing, integrating, testing and deploying documents, Expere generates accurate and compliant documentation throughout the entire deposit process – providing cost savings, increased efficiency, and a better customer experience.

Document preparation is an integral part of the deposit process. The integration of Expere with CRMNEXT provides financial institutions with a seamless document preparation solution and an efficient means to utilize existing data and generate deposit documents.

The CRMNEXT/Wolters Kluwer Expere Deposit integration provides a true in-branch, online, omni-channel solution that allows banks and credit unions to roll out new products faster and more conveniently. When used in conjunction with CRMNEXT's work simplification and automation capabilities, Expere centralizes the management of compliance content, providing the tools financial institutions need to implement changes seamlessly.

Expere's fully dynamic content engine applies comprehensive, automated logic to its integration transactions with CRMNEXT, providing access to the latest documentation, while allowing users to make updates and changes as necessary.



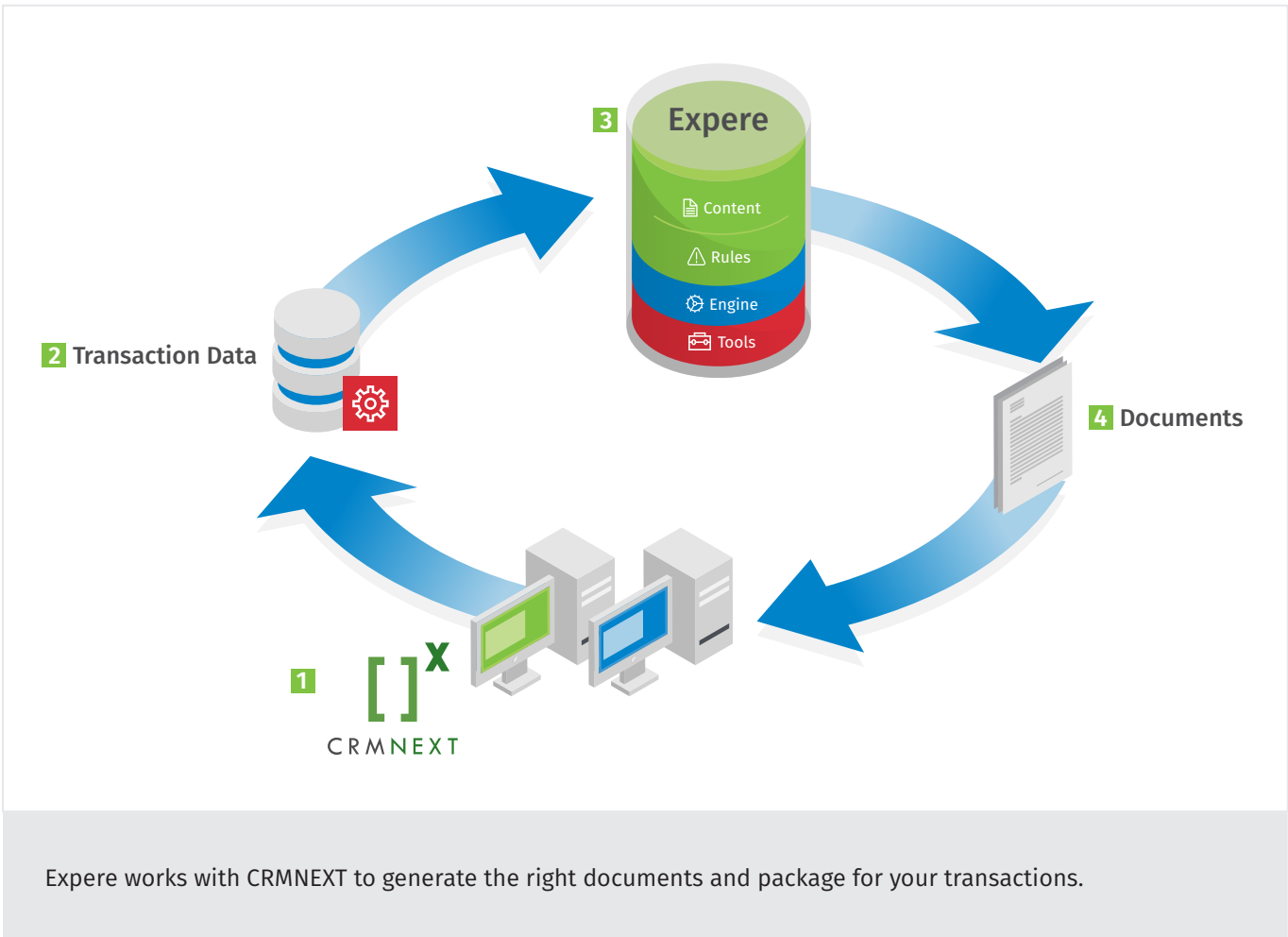
Advantages of the CRMNEXT integration of Expere include:

- Pre-built integration within the CRMNEXT solution provides increased operational efficiencies, reduced implementation time, testing and cost
- Seamless management of all aspects of compliance documentation, from automated document selection, assembly and packaging to content management, testing, integration and deployment without leaving the CRMNEXT platform
- Access to the latest compliance content that can be customized and edited by category, product or transaction using attorney-style language or plain language
- Centralized management of documentation and the tools to implement changes seamlessly
- Actionable insights available on a single click at all customer touchpoints

2,000+
Institutions
use Expere

Compliance Content You Can Count On

A warranted, single content source created and maintained by Wolters Kluwer; Expere delivers enterprise-wide compliance consistency. Over 50 compliance attorneys and analysts provide expert monitoring of both state and federal jurisdictions at the enterprise level. In addition to monitoring, maintaining and updating the Expere system, Wolters Kluwer experts draft, code and test documents, and quickly deploy releases. This means financial institutions can be certain they have access to the right documentation for the right transaction.



What Makes This Technology Combination Unique?

- Code-less toolbox for CRM in banks to create seamless one and done processes across all channels to deliver a frictionless experience
- Enable bankers to view data and continue the same process anytime, anywhere, and across devices on a unified CRM for banks
- Leverage the power of a unified banking CRM platform with high straight-through processing to boost first touch resolution reducing the cost of service delivery and account maintenance
- Significant boost in cross-selling capabilities and improvement in customer loyalty index
- CRMNEXT data is leveraged to automatically select, generate and package required documentation based on compliance rules for factors such as transaction, state and federal mandates as well as institutional policies
- Automatic selection of documents features both dynamic and static content
- Fully integrated solution supports both standard and custom content

Expere is backed by the unique combination of industry knowledge, technology and responsive customer support provided by Wolters Kluwer. For more information on how the integration of Expere into the CRMNEXT system can help you strengthen your loan and deposit process and accelerate your success. Contact your CRMNEXT or Wolters Kluwer sales representative.

About CRMNEXT

CRMNEXT, Inc. is the leading global CRM solution provider in financial services. A Gartner Magic Quadrant visionary company, CRMNEXT, Inc. picks up where traditional CRMs leave off providing work simplification, robotic automation, immediate results and greater empowerment for both team members and customers. It eliminates the artificial barriers between human and digital channels, enables innovation and world-class, omnichannel customer interactions from a single, unified platform. With more than one million bankers and one billion customers on the platform globally, CRMNEXT, Inc. has become the largest CRM in financial services by effectively recalibrating the potential for both large and small organizations to grow assets, quality relationships, profitability, service and innovation. For more information, visit www.crmnext.com.

About Wolters Kluwer Governance, Risk & Compliance

Governance, Risk & Compliance (GRC) is a division of Wolters Kluwer, which provides legal and banking professionals with solutions to ensure compliance with ever-changing regulatory and legal obligations, manage risk, increase efficiency, and produce better business outcomes. GRC offers a portfolio of technology-enabled expert services and solutions focused on legal entity compliance, legal operations management, banking product compliance, and banking regulatory compliance.

Wolters Kluwer (AEX: WKL) is a global leader in information services and solutions for professionals in the health, tax and accounting, risk and compliance, finance and legal sectors. Wolters Kluwer reported 2018 annual revenues of €4.3 billion. The company, headquartered in Alphen aan den Rijn, the Netherlands, serves customers in over 180 countries, maintains operations in over 40 countries and employs 19,000 people worldwide.

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For more information about our solutions and organization, visit WoltersKluwer.com, or for our financial services solutions, visit WoltersKluwerFS.com.