



EXPERT ENTERPRISE

Maximize the potential for scale and efficiencies in larger institutions coping with the complexity of broad product offerings and distributions channels. Unlock innovation and productivity gains, expand self-serve / digital capabilities and transform your customer experience.

Includes all features in Smart Start and Accelerated Growth, plus:

CRM

Catalyst Performance Modeler™

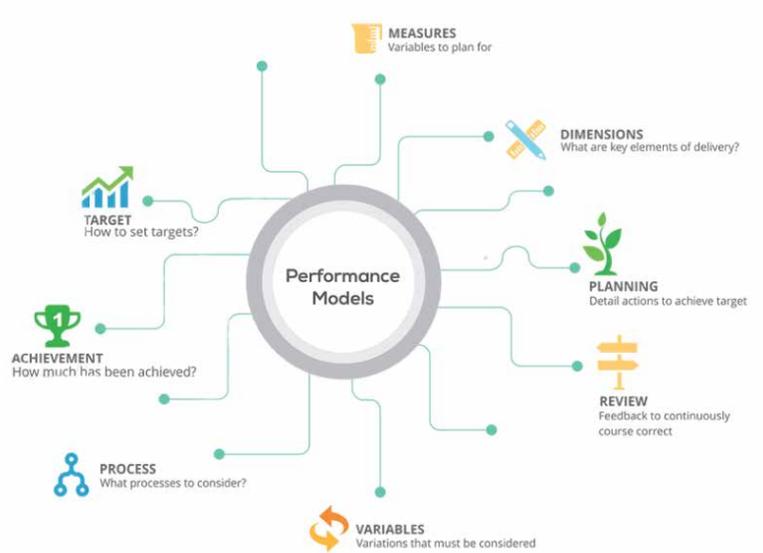
Take the guess work out of sales planning and targeting. Define performance models for sales performance, relationship activities, service effectiveness, etc. based on multiple variables. Set forecast projections based on previous sales forecasts and revenue, competition, economic conditions, sales team and their performances, industry trends and more. Monitor the sales pipeline and fine-tune your sales process with real-time insights into short and long-term business projections.

Mobile Access On-the-Go:

Access, view and update CRMNEXT from anywhere with the mobile app version.

Social 360 and Sentiment Analyses:

Pull social feeds directly into employee central.



Customer Management

Digital Self Service Journeys – VIVID Design Studio™

Provide true omnichannel experiences which can be started and resumed in any digital or assisted channel, using CRMNEXT's self-authoring, end-to-end digital build environment with designers that completely abstract the complexity of building and wiring complex digital journeys.

Knowledge Management:

Access the resources you need in a central repository for detailed product information including key features, descriptions, all cases, leads, sales, strategy, marketing, FAQs, troubleshooting instructions, product policy and procedures, application video demos, and more.

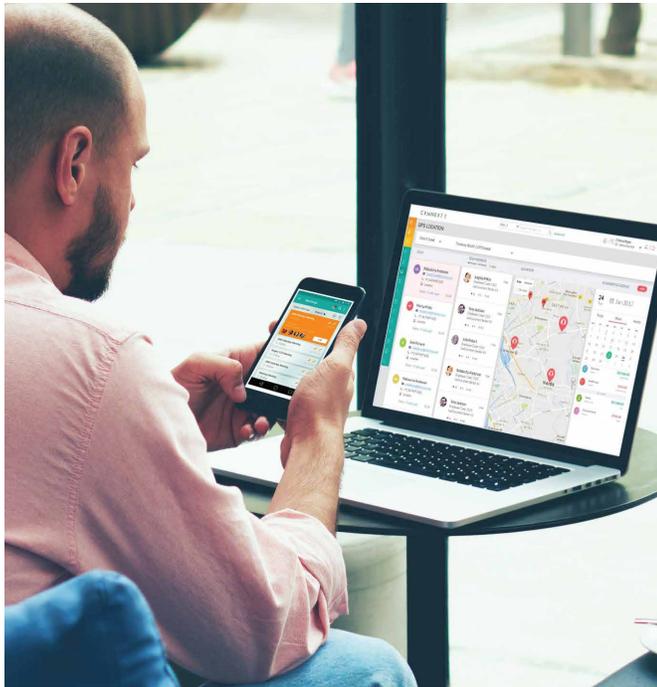
Customer Management cont.

Advanced Customer Action Center:

Maintain your customer's profile details directly from the Customer 360 view with actions at your fingertips including the ability to update phone number, email, address, relationship managers, power of attorney and more. Save time because operations conducted through the Customer Action Center will update the corresponding data in both the core and CRMNEXT. Additionally, conduct customer due diligence and beneficial ownership, enroll your customer in online banking, open a safety deposit box and other actions.

Advanced Case Management:

See case histories and past interactions to make issue resolution easier. Decrease turnaround times with straight through processing for common service request types. Accommodate unlimited advanced case types and case work flows.



Integration

Open Ecosystem:

Benefit from an open-ecosystem architecture for advanced automation and RPA support.

Autonoma Integration Designer™:

Configure, maintain and deliver codeless, real-time integration, even in complex IT environments, with CRMNEXT's intuitive drag-and-drop interface.

Analytics

Advanced Analytics:

Take advantage of integrated multi-dimensional analysis engine, advanced business rules decision engine, and AI-based algorithmic analysis across data sets to unlock actionable insights.



Reach us at

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