

CASE STUDY: FIRST BANK

SOUTHERN PINES, NC

FIRST BANK OVERVIEW

- FOUNDED : 1935
- EMPLOYEES: 1,000 +
- BRANCHES: 102 in North and South Carolina
- CUSTOMERS: 300,000 +
- ASSETS: \$5.5 BILLION

PRODUCTS AND SERVICES:

Complete Banking Services
Loan Services
Investment Services
Financial Planning
Wealth Management
Complete Insurance Services

TESTIMONIAL

" We were searching for a CRM system that would provide First Bank associates with the tools to have better conversations and more efficiently handle account opening and customer inquiries. CRMNEXT is the only comprehensive solution that does it all, and we're excited to partner with them. We believe the CRMNEXT solution provides the right tools to help our associates focus on the customer and differentiate our service. "

Cathy Dudley, Executive VP First Bank

GET IN TOUCH

For more information or to request a private demo or personalized workshop please contact:

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FIRST BANK CHALLENGES

ACCOUNT OPENING PROCESS COMPLICATED

- Screens displayed irrelevant data entry fields, causing confusion and errors
- Missed steps resulted in unnecessary rework for the back office
- Difficult to fully uncover customer needs at account opening, thereby missing opportunities to deepen customer relationship
- No real-time updates for tracking leads and referrals

INCONSISTENT RESOLUTION PROCESS FOR CUSTOMER ISSUES

- Many maintenance functions were still paper-based
- Unable to assign ownership for issue resolution, resulting in work redundancy
- No means to obtain speedy progress updates for maintenance requests or complaint resolution

LACKED PERSONALIZED SERVICE

- Customer information was stored in fragmented systems
- Bankers missed valuable consumer insights due to siloed applications
- Lifestyle changes occurred and went unnoticed and unrecognized

DIFFICULT CROSS-CHANNEL COMMUNICATION

- Lacked the means to convey consistent messages across all channels
- Pertinent customer information was not stored for viewing enterprise-wide, leading to missed sales opportunities

CRMNEXT SOLUTIONS

ACCOUNT OPENING, THOROUGH AND EASY

- Connects to information in legacy core systems
- Automation of previously manual processes results in faster, error-free and compliant on-boarding
- New process takes under 10 minutes with built-in regulatory guardrails

EMPOWERED AND EFFICIENT TEAM

- Bankers can both view and take action on a single screen
- Team saves time filling out forms, allowing time to build profitable relationships
- Supplanted or integrated 28 applications to simplify workflow
- Cross-channel communication is easily facilitated
- Single-sign on password saves team time and frustration

PERSONALIZED SERVICE, THE NEW STANDARD

- Enhanced customer insights allow relevant, prepopulated up-sell & cross-sell offers
- Bankers have up-to-the-minute understanding of all prior customer interactions without need to switch screens

CRMNEXT CAPABILITIES EMPLOYED

- **Two-way 360TM: "Do" as well as "View"**
- **Codeless Customization: Simplifies change management**
- **On-premise Deployment**
- **Secure Architecture**
- **Wolters Kluwer Expere[®] Deposit Integration**