



CRMNEXT

SMART START



Level the playing field using flexible technology and CRM integrated with your core platform. Right-sized for institutions over \$300 million in assets, Smart Start provides the foundation needed to unify customer information, manage opportunities and accurately track improvements in sales and service operations.

CRM

Lead Management:

Manage end-to-end sales operations from a single platform. Qualify leads based on custom-defined parameters to prioritize follow-ups and executions for closures. Ensure every lead is pursued with automated allocations, qualification scripts and customized workflows.

Campaign Management:

Personalize, automate and execute omnichannel campaigns to attract and retain customers. Utilize a visual design tool and single interface to design templates, segment data, implement initiatives and measure effectiveness.

Sales Pipeline Management:

Manage the entire sales pipeline from start to finish including outreach, response, prospecting and lead conversion.

Customer Management

Two-Way Customer 360:

See a highly granular, consolidated view of every customer from a single interface which brings together information from internal systems, third-party applications and manually captured data. Obtain superior insights on product holdings, wallet share, family information and lifestyle choices. Bi-directional integration ensures all information is always seamlessly updated.

Customer Management cont.

Customer Action Center:

Maintain your customer's profile details directly from the Customer 360 view actions at your fingertips including the ability to update phone number, email, address, relationship managers and more. Save time because operations conducted through the Customer Action Center will update the corresponding data in both the core and CRMNEXT.

Customer Profiling:

Visualize customer profile to offer tailored promotions, personalized services and accelerated problem resolutions.

Keep-in-Touch:

Ensure that customers are contacted at regular, predetermined intervals to maximize the customer life cycle. Create customized keep-in-touch programs based on customer profiles and assign to relationship managers. Set and receive timely reminders, alerts and escalations to make sure all activities, meetings and calls are completed per the program.

Two-Way Account 360:

See a consolidated, up-to-date view of all information related to an account including status, balances, alerts, attachments and related transactions, activities and service requests.

Customer Management cont.

Account Action Center:

Maintain accounts directly from the Account 360 view with a core set of actions. Only access the functions you need because items available for a given account may vary according to the account type and whether it is personal or non-personal. Rest easy because any actions taken will seamlessly update both CRMNEXT and the data in the core.

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 up to four unique case work flows.

Analytics

Reports and Dashboards:

Rapidly pull information, transform it into usable, actionable, drilled-down insights, and view them in a format of your choice. Broadcast a single report to thousands of users, who will only see filtered data depending on their roles and permissions – all with zero manual intervention.

Integration

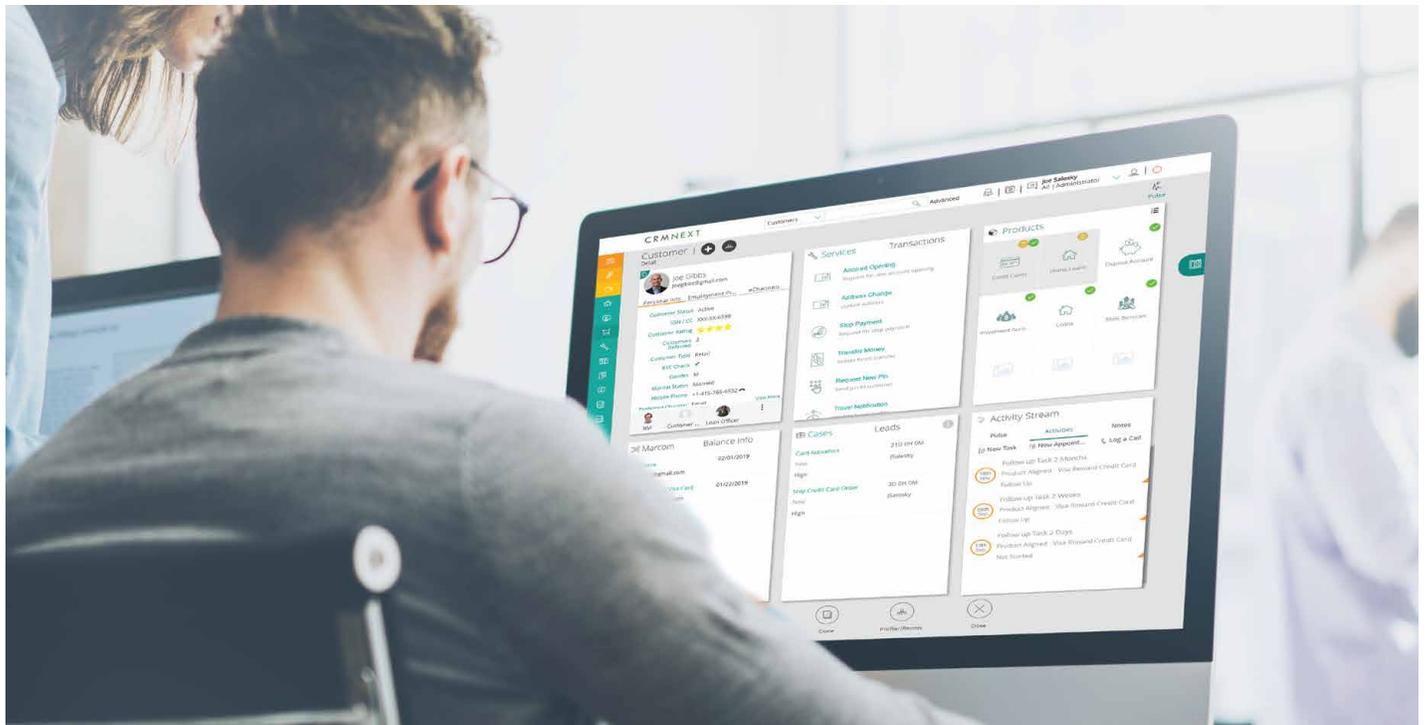
Seamless Integration:

Out-of-the-box seamless integration with your core system.

Workstation

Employee Central:

Get all of your to do's for the day on a single screen when you sign into CRMNEXT each morning. Complete tasks, conduct 2-2-2-12's, manage appointments and more from a singular, actionable dashboard that is configurable based on user role and permissions.



Reach us at

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