NexJ CRM for Corporate Banking

NexJ Customer Relationship Management (CRM) for Corporate Banking has intelligence built-in, and integrates client profile, interaction, and transaction information into a comprehensive customer view. On top of delivering superior performance and usability, our CRM for Corporate Banking product was built to address the integration challenges, inflating costs, and limited functionality faced by other CRM options currently on the market. By offering a CRM product that supplies the real-time data required by firms, we deliver a superior user experience, drive high user adoption rates, and provide a competitive total cost of ownership.

Complete View of the Client Across Regions and Product Lines

- Integrate profile, interactions, transactions, news, events, and third-party data sources into a unified client view
- Model sophisticated organizational relationships
- Comply with local data residency requirements in multiple regions

Deepen Insight Into Client Needs

- Identify patterns that describe conditions, trends, and events that affect clients
- Categorize clients based on global macro-economic, regional, sectoral, and company interests
- Associate relevant insights from research with a client
- Develop positions from insights and generate ideas for new opportunities

Collaborate to Increase Cross-Selling

- Strengthen collaboration across the entire client coverage team
- Improve global account planning to deepen client engagement
- Restricts access to the information users need and are allowed to see using dynamic security

Key Benefits

Increase share of wallet

by leveraging a complete view of the client across regions and product lines to identify opportunities as well as upselling and cross-selling possibilities

Gain a complete understanding

of client profitability and risk by aggregating accounts, holdings, and risk along corporate or ad-hoc hierarchies

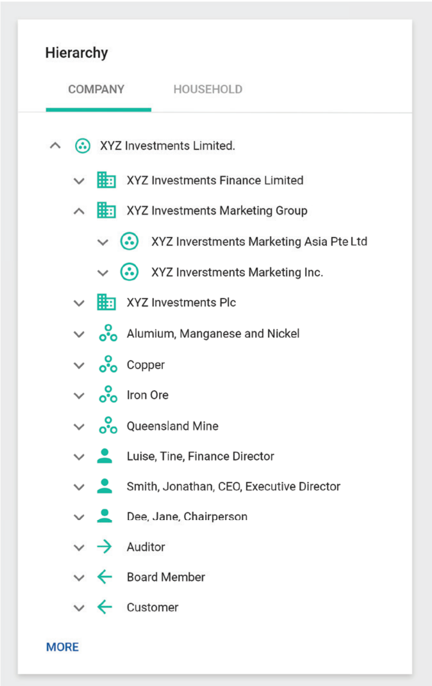
Increase collaboration

between bankers, relationship managers, and specialists across regions and product lines by improving information sharing and communication capabilities

Become a trusted partner

through deeper client insights and providing superior client service

NexJ CRM for Corporate Banking is an Intelligent Customer Management (ICM) product that provides best-of-breed CRM functionality tailored for Corporate Banking.



Client Relationship Modeling

Comprehensive Customer View

Designed to help consolidate all key information from data sources across your firm, our Comprehensive Customer View equips your bankers with the most informative, insightful and up-to-date information. Bankers can collaborate across regions and product lines to better understand client need, improve service, and drive revenues. Dynamic and robust security ensures users see only what they are authorized to see, to support local data residency requirements.

Opportunity & Deal Management

NexJ enables the efficient management of multi-product, multi-region opportunities. A two-tiered opportunity model tracks parent and product opportunities. Activities are automatically assigned to the right person. Dashboards allow managers to track and forecast opportunities.

Deal Chatroom

Bankers and product specialists can collaborate on opportunities in a centralized chat room. They can share documents, messages, and interactions in the context of a client or opportunity and view historical conversations in the contact profile.

Roadshow Management

Marketing can seamlessly execute complex multi-day, multi-location roadshows by identifying target clients, distributing invitations and support materials, and managing follow-up activities. NexJ tracks client response, attendance, and commitments to evaluate ROI.

Client Relationship Modeling

Built to help model client-centric relationships across corporations and spheres of influence, to understand client organizations and drive cross-selling and high-quality referrals.

Global Account Planning

Teams in multiple regions can collaborate on account planning. NexJ collects all necessary information, combines it with existing information, and shares it with other team members. Users can submit account plans to management for review and approval.

Lead Management

NexJ streamlines and standardizes lead management and sales processes. Banks can manage lead volumes, configure scoring and distribution rules, optimize resource allocation, monitor conversion rates, and understand the client's profile, score, and history.

Referral Management

Improve cross-regional and cross-product opportunities by making it easy for users in different regions and with different specialties to share valuable client intelligence and work together on opportunities.

NexJ Insights

An add-on module designed to provide bankers with opportunities for interactions to promote retention and advocacy, Insights is a built-in digital engagement service. It pulls relevant digital content from more than 10,000 third party publishers and filters it prior to distribution to ensure it complies with financial services regulations.

NexJ Nudge™

An add-on module developed to provide bankers with data-driven recommendations to help increase their customer's assets under management, NexJ Nudge™ functionality can help bankers deliver the best service and improve client outcomes – in real time. This feature generates and ranks actions, which are then presented to the banker to help them to carry them out.

To learn more, visit **www.nexj.com** or email **info@nexj.com**

NexJ Systems Inc.
10 York Mills Road, Suite 700,
Toronto, Ontario M2P 2G4
P: 416 222 5611 F: 416 222 8623
info@nexj.com www.nexj.com

About NexJ Systems

NexJ Systems is the pioneer of Intelligent Customer Management. Our award-winning CRM is designed to help Wealth Management, Private Banking, Corporate and Commercial Banking, and Insurance firms revolutionize their business. Powered by artificial intelligence, our products help drive productivity, boost client engagement, and increase revenue. With users in over 60 countries, our customers benefit from our deep expertise across financial services verticals, strategic investment in innovation, and commitment to their success.