NexJ Lead Management

Financial services and insurance firms regularly receive new leads and referral opportunities from a variety of sources. Firms are seeking to maximize the value of each lead, drive efficiencies in the sales process, and leverage their existing client base for cross-firm and cross-product referrals.

Siloed systems in each channel and line of business make it difficult to share information, distribute leads, and implement a consistent sales process. Firms must therefore streamline lead and referral management to institutionalize best practices for loading, scoring, distributing, and working these opportunities to maximize profitability and conversions. Firms can also implement closed-loop analytics to proactively drive the right behaviors and enable management to eliminate bottlenecks and optimize results.

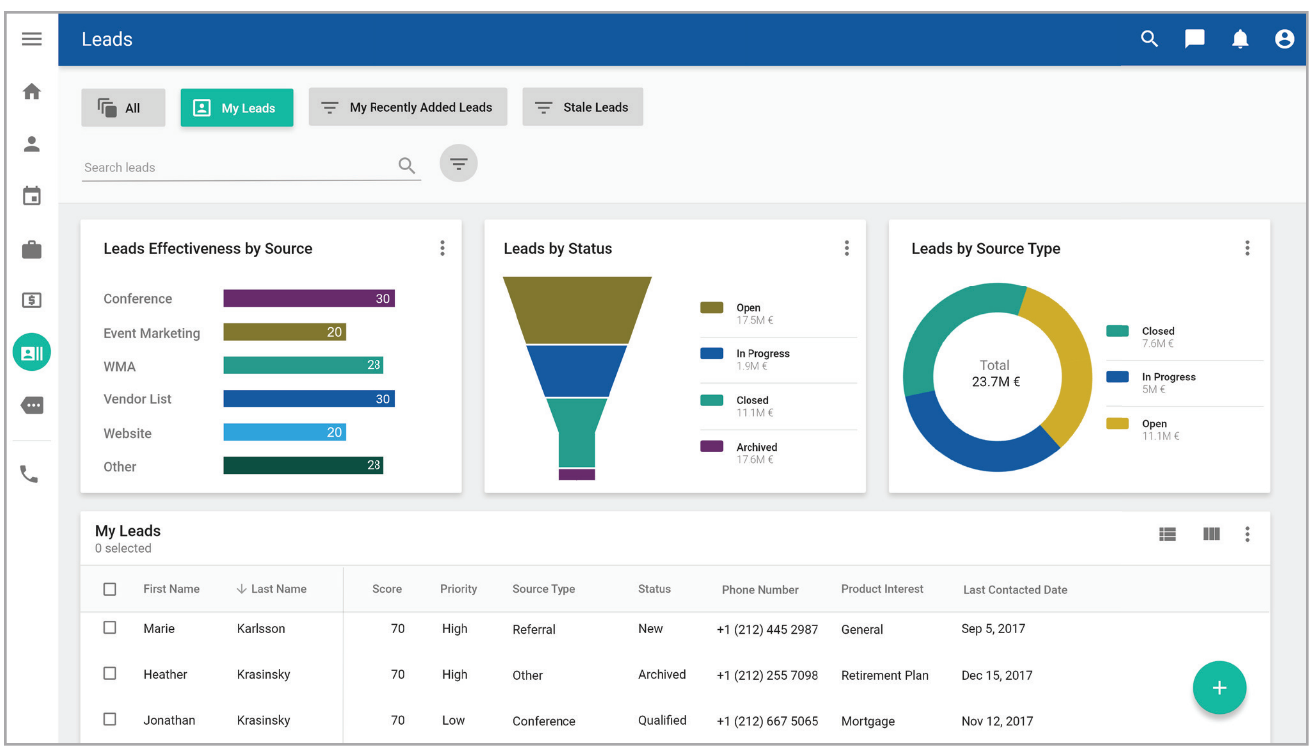
Our lead management capabilities enable firms to:

- Capture and process all leads consistently through a single application
- Provide unique capabilities to maximize the profitability of each lead
- Encourage system adoption by making it easier for sales reps to convert leads
- Drive revenue profitability and optimize processes through close loop analytics

NexJ provides capabilities and integration points to capture leads from multiple sources, channels, and other lines of business, including personal referrals, events, contact center referrals, and purchased vendor lists, through a single centralized interface. Consistent lead capture and processing helps produce reliable metrics and KPIs that empower organizations to determine lead profitability by source, sales concept, segment, and more.

Key Benefits

- Equips you to capture and categorize all lead information
- Provides you the ability to score and determine the profitability of each lead
- Fosters adoption by making it easier for sales reps to convert leads
- Drive revenue predictability and optimize processes
- Guides lead assignment and distribution via targeted interactive dashboards
- Advanced filtering capabilities to identify targeted leads



Qualify Leads for Maximum Conversion

Increasing the quality of leads is essential to profitability. Firms can configure the following lead management capabilities to improve lead quality:

- Advanced matching and merging service matches new leads against lead and client databases to identify erroneous, duplicate, and related leads to ensure sales rep efficiency and effectiveness
- Scoring engine quantifies each lead's propensity to convert based on a multitude of factors, including lead source and history
- Central and automated lead distribution sends leads to sales reps based on intelligent business rules, measures the time needed to act on each lead, and re-distributes stale leads for effectiveness

Automate Sales Process Best Practices

NexJ provides the following tools to increase system adoption, guide sales reps to proactive action, and streamline the sales process:

- Actionable dashboards that help sales understand lead assignment and drive next best actions to increase conversion and new business
- Easy to use call lists that include reasons to call, a configurable call script, information on related leads, and a simple disposition dropdown that guides next actions
- Lead interaction history to provide context and background information
- Bi-directional Microsoft Exchange synchronization to provide reps in the field with all meeting and contact information on Microsoft Outlook and mobile devices
- Schedule item templates with appropriate marketing material attachments
- Activity Plans that institutionalize best practice workflows for all sales reps
- In-context integration to third party applications to support increased lead generation

Closed Loop Analytics Drive Revenue Predictability and Process Improvement

At every stage in the lead management process, embedded analytics and dashboards:

- Help firms understand the effectiveness of leads by source and determine outcomes
- Optimize the quantity and quality of leads
- Detect bottlenecks and inefficiencies in the lead management process
- Optimize lead distribution based on conversion metrics and performance KPIs
- Drive next best actions that increase conversion and new business
- Determine lead volume and source requirements necessary to meet business objectives

These metrics help organizations achieve revenue targets by investing in the appropriate source and quality of leads and driving conversion through informed decisions and best practices.

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.

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