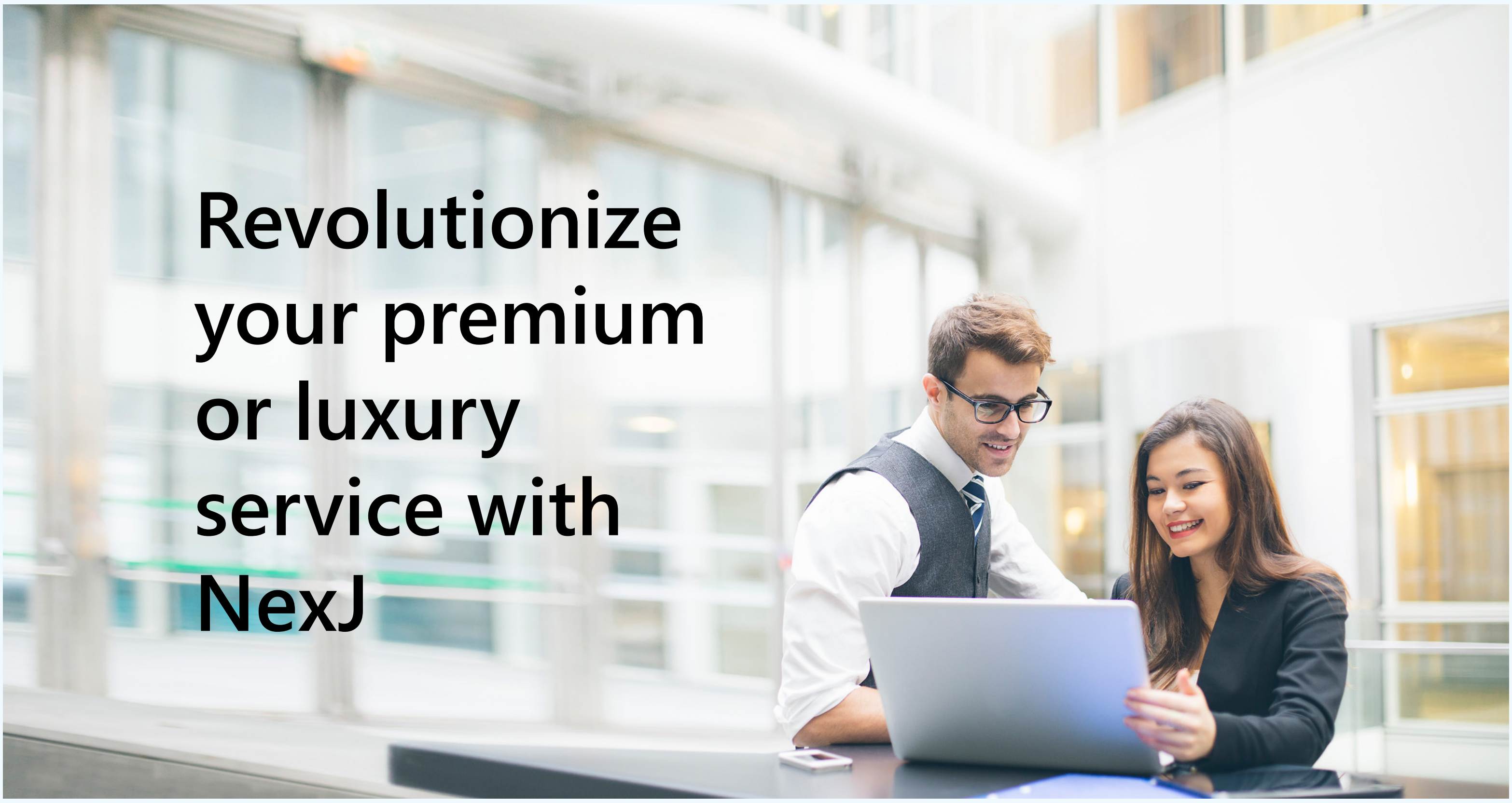
Concierge Service

Your Best Service For Your Best Clients



> *Business is about **Relationships***

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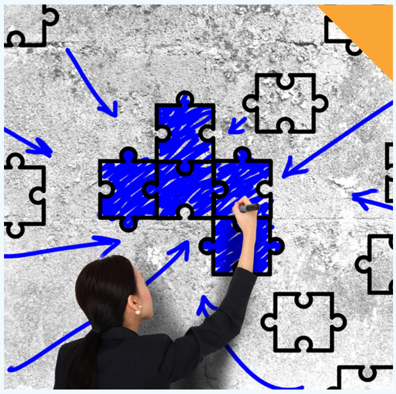


Introduction

“Business is about *Relationships*”

At NexJ, we truly believe that business is about relationships. There are few places where this is more evident than when delivering concierge service to High Net Worth Individuals (HNWI) and Ultra High Net Worth Individuals (UHNWI) in the Private Banking industry.

Concierge service, also called luxury, platinum, premium, high-end, or superior service, is centered on the relationship between a private banker and their client. These are long term and unique relationships that include a high level of personalized service that takes the client’s specific needs, interests, and goals into account.

Developing and maintaining these relationships is crucial to retaining (U)HNWI clients. NexJ CRM provides you with all the capabilities to fully understand your complete relationship with your client and their extended household.

In this eGuide, we discuss how you can use NexJ CRM to provide personalized service, automate your business processes, stay advised of changes, and collaborate with your coworkers to deliver the best possible concierge service to your (U)HNWI clients. At NexJ, our business is about your relationships.

Win More Through Quality Relationships

We understand the importance of client relationships for you because our relationships with our customers are equally important. Our client loyalty management capabilities, which are based on the service model we use with our own customers, is designed to deepen relationships and help you provide superior personalized service.

So you can truly understand your clients, our [Comprehensive Customer View]() contains all of the information about the client and the client's extended household in a single location. Integrated data from other internal customer systems and external sources is combined with entered data, schedule items, actions, and interaction history to deliver a holistic view of your clients. This offers the basic and in-depth information you need to provide quality concierge service.

Our application allows you to segment your clients into tiers based on their asset value, or any other criteria, and stipulate planned financial and non-financial touches. Managing service touches in this way increases client loyalty because it allows you to be proactive rather than reactive. You can track performance against the service levels using a dashboard. This shows you when clients have last received service, which clients have service outstanding, prioritized by date and tier, and what needs to be done.

By leveraging our application to improve personalized service, you can increase your upsell and cross-sell opportunities because you have intimate knowledge of what your clients need. By providing superior service for your clients and their extended household, you can work towards obtaining more assets under management.

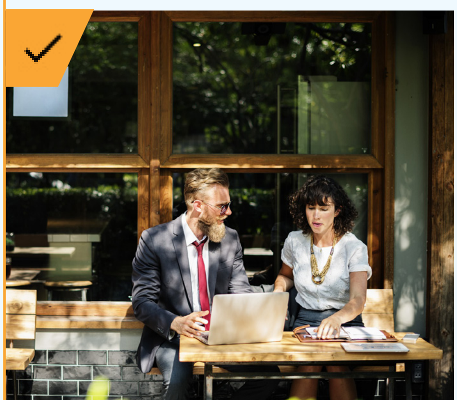
Delivering Personalized Service

Our loyalty management capabilities allow Relationship Managers (RMs) to manage key client interactions based on defined service level tiers, including:

- Scheduling and tracking of key activities (i.e. annual/quarterly account reviews, KYC update)
- Batch scheduling and tracking of key activities (i.e. annual/quarterly territory reviews)
- End user analytics to view status of key client touches and overdue activities
- Key Client touches and date management, including KYCs, IPSs, birthdays, anniversaries, last contacted, last proactive touch, last quarterly review, etc.

Client loyalty management can also allow RMs and their managers to analyze, aggregate, and report on these activities with analytic dashboards that show:

- Status of key touches and overdue activities
- Management summaries of Activity Analysis, rolled up by organizational structure and/or geographic region
- Performance against service level tiers



Embrace Efficiency

Our application provides [process management capabilities] that can allow you to quickly automate complex client-centric business processes. These processes can be integrated with existing systems and data stores to increase efficiency and productivity, improve the client's experience, and reduce operational costs. This means that RMs can spend less time on administrative tasks, giving them more time to focus on their clients' goals. Additionally, .clients save time by needing to answer fewer questions and complete fewer forms.

There are two types of workflows provided by our process management functionality:

- Activity Plans are a collection of steps, or tasks and schedule items, which are automatically sequenced and assigned to the appropriate users to accomplish a specific business objective or workflow. Each step in an activity plan is automatically triggered by the completion of the last step.
- SmartForms allow you to create screens, sets of questions, and a workflow to guide users through the appropriate steps to complete a specific processes, such as guiding users through an onboarding questionnaire. Run-time configurable forms and approval processes can allow you to adapt to changing business and regulatory conditions as needed.

Using these two types of processes, you can automate many different procedures, verify that best practices are followed, and keep track of outstanding tasks or service touchpoints. This will help you ensure that your clients are receiving the best possible service while decreasing the amount of time you need to spend on administrative tasks.

Automating Processes

Our workflows and activity plans allows relationship managers to build their relationships with their clients by:

- Increasing efficiency by reducing administrative tasks and offering more time to focus on the client’s needs
- Taking the guesswork out of client processes and streamlining the collection of required information through dynamically branching forms
- Tracking the status of activities and workflows using dashboards so you are aware of deadlines

SmartForms can also allow you to:

- Streamline and automate complex client-centric business processes, saving your clients' time
- Verify regulatory requirements and company policies are met to ensure consistent service
- Drive effective and efficient business process automation through:
    - Rapid business configuration of processes
    - Seamless integration to existing systems
    - Guided data entry in dynamic, rule-driven forms
    - Rule-driven approval routing and actions
    - Omnichannel business processes
    - Mobile support

Be in the Know

Notifications provide important information about internal or external events in relation to a client and their service needs. They can prompt you to take action, give you information, or remind you of tasks or meetings.

Our application allows you to configure business rules that detect events and deliver notifications to the appropriate users. Internal notifications can be triggered from events such as action items, upcoming or past due events, or task assignments. Notifications can also be triggered [in response to external events through integration](), such as receiving notifications about changes in market data.

Notifications can be built into a workflow or an activity plan, or can be specified for a particular service touchpoint or any other action item. They can advise a user of an upcoming or overdue activity, as well as the reason for the activity. Notifications can also include links that take the user to a specific page in the application, making the notification actionable.

Each notification has an associated priority. Priorities can be set manually or automatically based on business rules, such as when deadlines are missed. Depending on the importance of the notification, it can be received as a badge or banner, or through alternate channels like SMS, email, mobile, or an interruptive alarm dialogue as well as in the notification inbox.

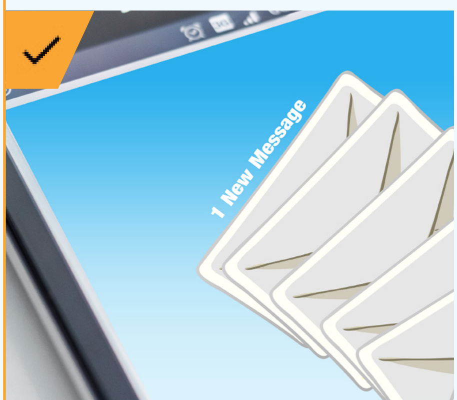
Leveraging Notifications

Our notifications allow relationship managers to manage their tasks and service touchpoints by:

- Delivering notifications in real-time through the notifications inbox or other channels
- Using run-time configurable business rules to detect events and deliver notifications
- Ensuring you're are on track by:
    - Prompting you to carry out actions
    - Keeping you up-to-date through reminders

Notifications can also allow you to:

- Subscribe to predefined events in the system
- Easily navigate to the source of the notification
- Perform an action directly by clicking a link in the notification



Work Together and be Better

Collaboration is vital in every industry. But it's especially important when providing concierge service to HNWI private banking clients. Firms need to be seen as well-oiled machines where everyone has the best interests of the client at heart.

We provide extensive functionality to enable team selling and improve collaboration between users, clients, and partners. These include group scheduling and task management features, workflows, coverage teams, and integration with client portals.

To successfully plan your collaboration efforts, you can view your own schedule, add new schedule items for yourself or others, enter a single schedule item for multiple contacts, and view the schedules of and add scheduled items to the calendars of other team members. Team calendars also enable all members of a designated team to view all items for the team in a single calendar.

Using coverage management, you can enable your whole team to collaborate on a client's service. A client coverage team can enable a dynamic team of users with specific business roles to service the client based on a predefined coverage group role setup. Role-based coverage teams enable you to easily move a record or blocks of business to another user and back again. Business rules can also be defined to automatically assign users to coverage teams.

Collaborating Company-Wide

Our collaboration capabilities allow relationship managers and other users to work together more effectively than ever before. With these features, you can:

- Engage customers in the location of their choice using a tablet or smartphone
- Securely share and update information and messages
- Share information and documents in the context of a customer through secure messaging to speed response times, enlist subject matter expert input, and capitalize on cross-sell opportunities
- Complete workflow tasks according to your assigned role
- Provide tailored customer service through the use of coverage teams
- Monitor life events and collaborate with clients via social networks
- View and create new tasks and schedule items for other users

Conclusion

Using NexJ CRM, you can offer the top quality service that's expected by your (U)HNWI clients by having a complete understanding of the client and their entire household. By leveraging our automation, notification, and collaboration capabilities to provide personalized service, you can effortlessly stay on top of what's needed.

We know that business is about relationships, and we look forward to building a relationship with you so you can build a better relationship with your clients.

> *Business is about* ***Relationships***

Want to Know More?

We'd love to talk to you!

Contact us at info@nexj.com for more information or check out our website at www.nexj.com!

Concierge Service with NexJ CRM

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