NexJ Comprehensive Customer View

All of Your Client Information in a 360⁰ View

In today's digital age, information is the newest currency. With the ever-increasing amounts of information available about your clients, it is becoming more critical to have a single, centralized source for all of this information. Without that single source, you never know when you may be missing information, working with old information, or when new information is available.

Corporate Banking firms need a complete understanding of each client across all lines of business, regions, and channels to satisfy all stakeholder expectations. The NexJ Comprehensive Customer View is uniquely able to address this need. The Comprehensive Customer View integrates demographic, transaction, interaction, and social data into a common view and models complex relationships and spheres of influence so that you can better understand your clients.

By integrating all of your existing internal and external data sources with NexJ CRM, your company can ensure that bankers always have the most up-to-date information at their fingertips - no more toggling or collating data. This reduces administrative tasks and operational costs by enhancing productivity and efficiency, and allows bankers to get more out of the system than they put into it.

Collaboration is also especially important for Corporate Banking firms, where multiple users may work together to help service a single client. Firms can use the Comprehensive Customer View to share information and collaborate on opportunities across divisions, product lines, geographies, and channels without sacrificing line of business-specific customer perspectives, workflows, and processes.

With the Comprehensive Customer View, firms can implement company-wide initiatives that rely on collaboration and information sharing between lines of business and regions and deliver a single source of truth that can be leveraged to deliver top quality customer service.

Key Benefits & Value

Drive Referrals and Opportunities

allowing you to increase the number of proposals and close deals.

Support Business Growth

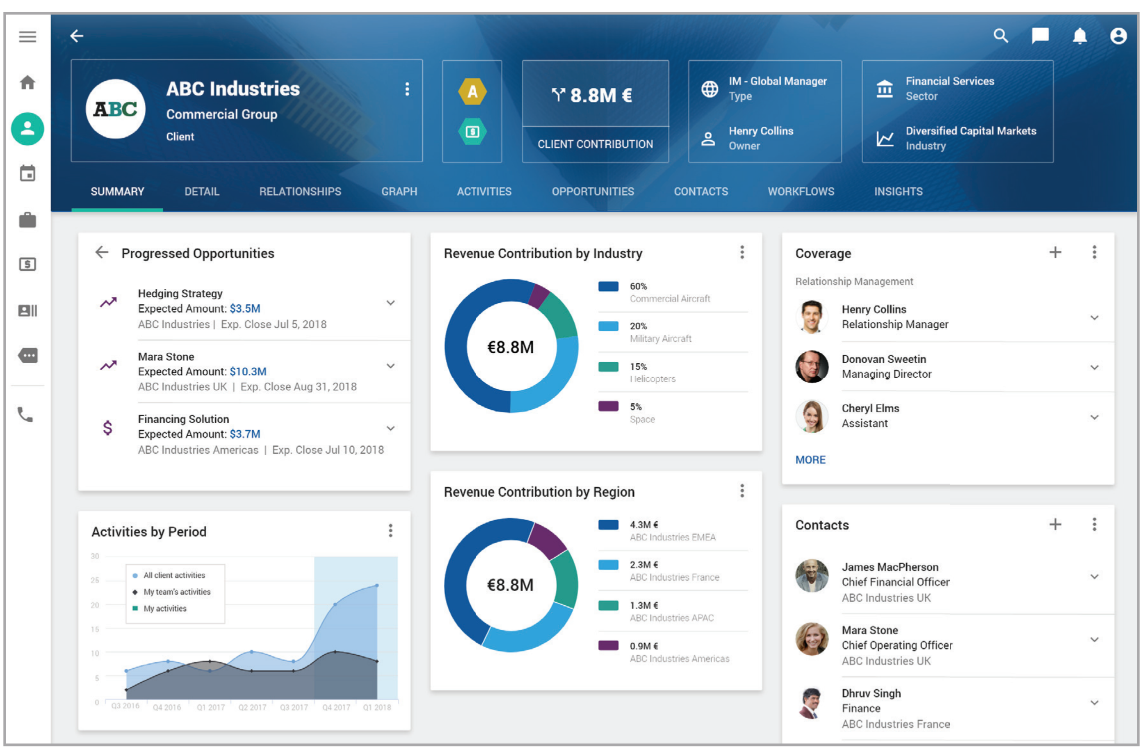
by driving client loyalty.

Enhance Your Clients' Experience

by providing bankers with insightful information.

Improve the User Experience

by providing all relevant information about clients in a single, centralized location.



Our Comprehensive Customer View provides bankers with a 360° view of their contacts, in an easy-to-view and navigable format. This is exposed through our Integrated Desktop, which delivers a comprehensive view of front, middle, and back-office information. To present this information to users as a single application, this information is combined with CRM functionality and workflows in a flexible portal container with seamless context passing. In sum, you can quickly and effectively leverage company data and applications to better understand, sell to, and service your clients.

By consolidating information across company-wide sources, it allows bankers to create a single point of truth that is shared across all lines of business. Key data points include profile information, demographic information, activities, and related account information.

Key Features to Drive Results

- **Integrated Desktop:** You can integrate back office systems and other applications into an Integrated Desktop. This dramatically reduces the amount of time bankers spend on double entry, manually collating data from multiple applications, and filling out forms.
- **Relationship Hierarchy:** This feature models complex relationships and spheres of influence. It can aggregate and roll up product and interaction information along hierarchies. Bankers can drill to detailed information on each client, including services, coverage team, related parties, and documents. In addition, it models client relationships, including the client's personal and professional relationships, coverage team, ad hoc hierarchies, and spheres of influence. This information can be rolled up along hierarchies to allow users to view all of the above information for each relationship.
- **Interaction Journal:** Our Interaction Journal logs all client interactions, including meetings, communications, events, etc.
- **QuickNotes:** This feature allows bankers to capture and view notes about the client.
- **Data and System Integration:** Integration with internal systems and external data feeds ensures that you have a comprehensive view of your clients.
- **Custom Fields and Categories:** This feature allows bankers to collect extended profile information and enables users to effectively segment contacts based on type, interests, or other criteria for sales, marketing, and reporting purposes.
- **Client Insights:** Insights from other systems can be viewed in the Comprehensive Customer View. This includes buying history, trading volumes, credit limits, revenue, holdings, assets under management, interests, and research subscriptions.

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

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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.