

NexJ CRM for Corporate Banking

Why Leading Bankers Trust Us

Increasing
Your Share of
Wallet With
NexJ CRM



“

Business is about Relationships[®]

”





Contents

1

[Introduction](#)

2

[Our Value](#)

3

[Our Capabilities](#)

9

[Our Technology](#)

11

[Our Benefits](#)

12

[Our Success](#)

13

[Conclusion](#)

Introduction



NexJ Systems, the pioneer of Intelligent Customer Management, is the trusted partner for CRM products by global corporate banking institutions because of our deep domain expertise, next-generation technology, strategic investment in innovation, and strong commitment to customer success.

With customers across the financial services industries on virtually every continent, our global presence is fostered by our knowledge of regional markets and local industry trends. Equally as important, we support a global user community, with users in over 60 countries.

Our highly-experienced executive management and operations management teams are the force behind our ever-evolving strategic direction, company vision, and thought leadership.

We pride ourselves on strategically partnering with our customers to help them take advantage of our deep domain expertise. This experience has led us to create a corporate banking product that is tailored to help you meet your business objectives. [CRM for Corporate Banking](#) helps bankers grow revenue by solidifying client relationships

Our products can meet all of your CRM needs in a single package – this includes sales, service, and marketing capabilities which are tuned to your specific industry. This is why we are the pioneer of [Intelligent Customer Management](#).

This eGuide discusses how our corporate banking product can help bankers build relationships, save time, and increase revenue.

Our Value



Save Your Time

Streamline processes such as global account planning, leads, and opportunities, from data entry to approval. Also automate administrative tasks, allowing you to focus on your clients rather than on paperwork.



Build Your Relationships

Understand your clients' activities across regions and product lines, model their sophisticated organizational relationships. Identify patterns that describe conditions, trends, and events that affect your clients so that you can demonstrate your value to them and ultimately secure their loyalty.



Increase Your Revenue

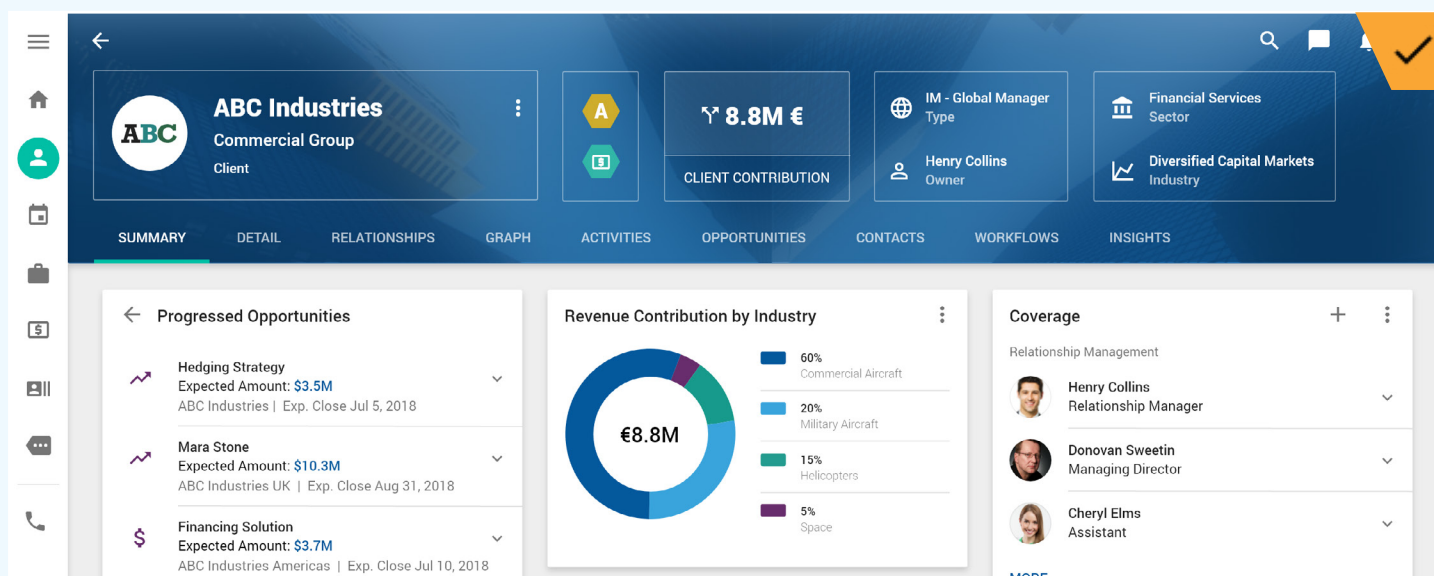
Increase your number of opportunities, leads, cross-sells, and referrals, speed up your time-to-revenue through onboarding, and secure your clients' loyalty to grow your share of wallet.

Our Capabilities

Comprehensive Customer View

Our [Comprehensive Customer View](#) (CCV) provides bankers with a 360° view of their contacts, in an easy-to-view and navigable format. It gives bankers the ability to make recommendations in a fraction of the time, without any toggling or data collating.

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 That Drive Results:

- ▶ **Relationship Hierarchy:** Aggregates and rolls up account and interaction information along complex relationships. Bankers can drill to detailed information on each client, including transactions, coverage team, related parties, and documents.
- ▶ **Interaction Journal:** Logs all client interactions, including meetings, communications, events, etc.
- ▶ **Quick Notes:** Enables bankers to capture and view notes about the contact.
- ▶ **Customer Profile:** Consolidate all information about a client from across the organization.
- ▶ **Custom Fields and Categories:** Allows bankers to collect extended profile information and enables them to effectively segment contacts based on type, interests, or other criteria for sales, marketing, and reporting.
- ▶ **Client Insights:** Insights from other systems can be viewed in the CCV. Includes buying history, trading volumes, credit limits, revenue, holdings, assets under management, interests, and research subscriptions.

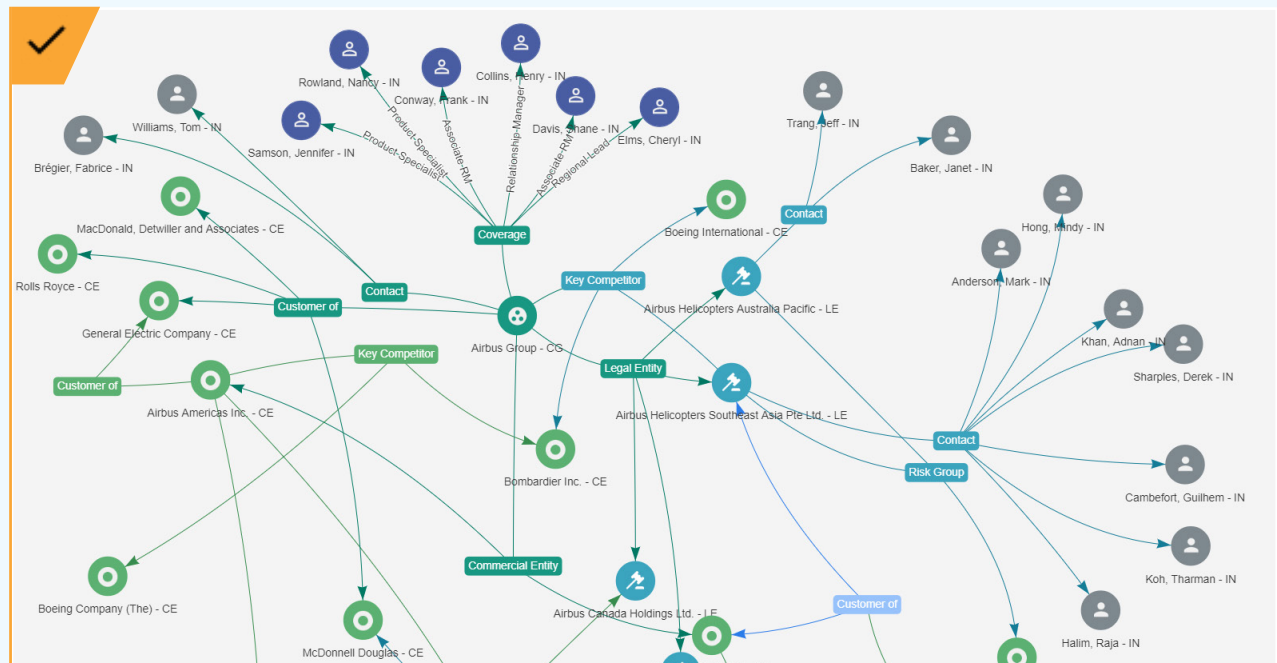
The Value Our Comprehensive Customer View Can Provide You:

- ▶ Drive referrals and opportunities to increase revenue.
- ▶ Increase upselling and cross-selling by driving client loyalty.
- ▶ Enhance face-to-face client experience by providing bankers with insightful information.

Client Relationship Modelling

Our robust [Client Relationship Modelling](#) capability takes managing relationships to the next level by providing bankers with insights around complex relationships including legal relationships, financial relationships, business relationships, related parties, companies, and subsidiaries, referrals, and other banker-defined groups. To provide added flexibility, it supports both hierarchical and ad hoc groupings such as associations or professional affiliations. Bankers can drill to detailed information on each account including transactions, coverage team, related parties, documents, and more.

This functionality also allows bankers to map out a global organization which can be used to drive cross sell opportunities across regions.



Key Features Allow You To:

- ▶ **View and manage** the financial products purchased, accounts, holdings, and related transactions for each client, across their entire organization.
- ▶ **Aggregate data in real-time**, offering a complete view of the client's total value and rolling up account information along defined hierarchies.
- ▶ **Generate reports** at any level of the client relationship.

The Value Our Client Relationship Modelling Capability Can Provide You:

- ▶ Aggregate information along defined hierarchies.
- ▶ Better customer service through the complete understanding of a client's entire organization.
- ▶ Make intelligent, data-driven decisions around complex relationships.

Guided Account Planning

Our [Guided Account Planning](#) capability for corporate bankers streamlines the end-to-end process of opening, planning, and reviewing financial accounts. In particular, it helps guide data capture and data validation (via front-end systems) to coordinate account review and approval processes (via back-office environments). For instance, it notifies bankers when they need to action a task and automatically sets the task status to complete when done.

Contacts \ ABC Resources Ltd. \ ABCR_2018 - Account Plan for ABC Resources Limited - Fiscal 2018

ABCR_2018 - Account Pl...
ABC Resources Ltd.
Oil & Gas

Cheryl Elms
Account Manager

May 3, 2018
Date of Last Plan

Jan 6, 2018
Relationship Start

Tim Lamont
Executive Sponsor

Aug 3, 2018
Date of Next Plan

May 14, 2018
Date of Approval

OVERVIEW FINANCIALS RISK OPPORTUNITIES WALLET COMPETITORS PERFORMANCE

Client Strategy Our Strategy

The company strives to operate and own 100% of its own assets. This allows them to start up or shut down drilling programs on very short notice - facilitating on ever-vigilant weekly allocation of capital by the Management Committee. Maintaining a strong balance sheet and access to capital markets is integral to delivering their plan. The Company targets strong investment grade debt ratings and manage their liquidity as a core asset. When appropriate, ABC Resources Ltd. augments these plans with a disciplined hedge program which strives to provide fuels flow certainty in the short term, such that the capital plans made by the Company are prudently financeable.

Company Overview Market Overview

ABC Resources Limited, or ABCRL or ABC Resources, is a Canadian oil and gas exploration, development and production company, with its corporate head office in Calgary, Alberta. Along with its core area Western Canadian Sedimentary Basin (WCSB). ABCRL also has North Sea and offshore West Africa fields by 2011, with a production of 121,000 barrels. ABCRL was one of Canada's largest companies and Canada's "single biggest conventional heavy oil producer".

Coverage Team Client Contacts

	First Name	Last Name	Role
<input type="checkbox"/>	Jamie	Aaronson	Relationship Manager
<input type="checkbox"/>	Valerie	Acton	Underwriter
<input type="checkbox"/>	Walker	Acton	Underwriter
<input type="checkbox"/>	Hallie	Ball	Assistant
<input type="checkbox"/>	Sebastian	Ball	Relationship Manager
<input type="checkbox"/>	Katherine	Bernstein	Underwriter
<input type="checkbox"/>	Lou	Bernstein	Relationship Manager
<input type="checkbox"/>	Brigitte	Beaudelaire	Assistant
<input type="checkbox"/>	Jean Paul	Beaudelaire	Assistant

Key Features and Benefits Include:

- ▶ **Accelerated Approval Processes:** This functionality automatically routes completed forms to approvers.
- ▶ **Activity Plans and Service Level Management:** Automates and Standardizes regular account review and planning processes through a set of sequenced tasks and schedule items assigned to bankers and product specialists.
- ▶ **Electronic Data Collection and Transfer:** Prevents errors and omissions, eliminates redundant work, and enriches data quality around your clients' profiles.
- ▶ **Flexible Reporting Capabilities:** Allows bankers to generate customized, graphical reports to track performance to plan.

The Value Our Guided Account Planning Capability Can Provide You:

- ▶ Drive upsell and cross-sell opportunities
- ▶ Speed up the asset conversion process
- ▶ Expedite the client onboarding process
- ▶ Boost client satisfaction

Call Reporting

[Call Reporting](#) allows bankers to quickly log the details of any client interaction and automatically sends it to the people that need to know. Each report includes details, outcomes, and follow-up actions, ensuring that clients get quick service and that compliance requirements are followed.

The screenshot displays the NexJ CRM interface. The main section is titled 'Contacts' and features a navigation bar with tabs for 'All', 'Contacts', 'Companies', 'Households', 'My Contacts', and 'Renewals'. Below the navigation bar is a search bar labeled 'Search by name'. The main content area shows an 'Energy Call List' with 45 items and 0 selected. The list is a table with columns: First Name, Last Name, Status, Touch Status, Touch Date, and Email. The table lists several clients, including Jamie Aaronson, Valerie Acton, Walker Acton, Hallie Ball, Sebastian Ball, Katherine Bernstein, Lou Bernstein, Brigitte Beaudelaire, and Jean Paul Beaudelaire. Sebastian Ball is highlighted in blue. To the right of the table is a 'Call Log' sidebar for Sebastian Ball, showing details for a 'Renewal Campaign' call. The sidebar includes fields for Reason, Description, Recipients (James Kline, Sierra Stone, Tyler Marsden), Notes (Sebastian confirmed he would like to renew.), and Disposition (Send renewal forms.). At the bottom of the sidebar are buttons for 'CANCEL', 'SAVE', and 'END CALL'.

	First Name	Last Name	Status	Touch Status	Touch Date	Email
<input type="checkbox"/>	Jamie	Aaronson	Client	Completed	Mar 9, 2019	jamie.aaronson@gmail.com
<input type="checkbox"/>	Valerie	Acton	Client	Completed	Mar 9, 2019	val.acton@aol.com
<input type="checkbox"/>	Walker	Acton	Client	Completed	Mar 9, 2019	walker.acton@aol.com
<input type="checkbox"/>	Hallie	Ball	Client	Completed	Mar 9, 2019	hallieb@gmail.com
<input type="checkbox"/>	Sebastian	Ball	Client	Outstanding	Mar 10, 2019	sball@dell.com
<input type="checkbox"/>	Katherine	Bernstein	Client	Outstanding	Mar 10, 2019	kbernstein@gmail.com
<input type="checkbox"/>	Lou	Bernstein	Client	Outstanding	Mar 10, 2019	lbernstein@gmail.com
<input type="checkbox"/>	Brigitte	Beaudelaire	Client	Outstanding	Mar 10, 2019	bbeaudelaire@blackrock.com
<input type="checkbox"/>	Jean Paul	Beaudelaire	Client	Outstanding	Mar 10, 2019	jbeaudelaire@apple.com

Key Features Include:

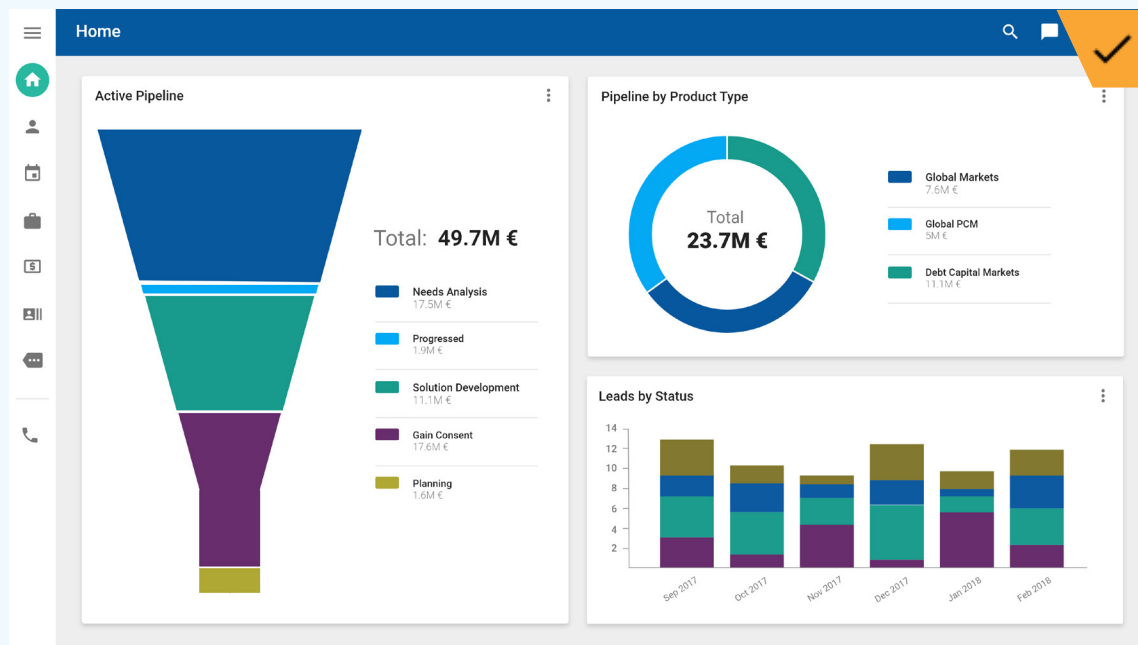
- ▶ **Interaction Journals:** All call records are saved in detailed call reports and are assigned to each client's Interaction Journal. This provides an exhaustive interaction log, across lines of business and through multiple communication channels.
- ▶ **Workflow Capabilities:** Call reports are categorized as action items, or tasks, meaning they can be part of any activity plan or workflow.
- ▶ **Alerts and Notifications:** Call reports can include reminders that alert or notify users of updates or changed assignments of the call report.

The Value Our Call Reporting Feature Can Provide You:

- ▶ Boost collaboration by allowing bankers to share call information with other users across the organization

Opportunity & Deal Management

Our [Opportunity and Deal Management](#) capability for corporate banking provides bankers, sales managers, and product specialists with sales planning, tracking, and collaboration tools design specifically for Corporate Banking. Through this functionality, bankers are able to manage complex, multi-product opportunities through every stage of the sales cycle. We also offer a 2-tiered opportunity model that allows bankers to create and collaborate on parent and product opportunities, driving efficiency when managing multi-product, multi-region opportunities.



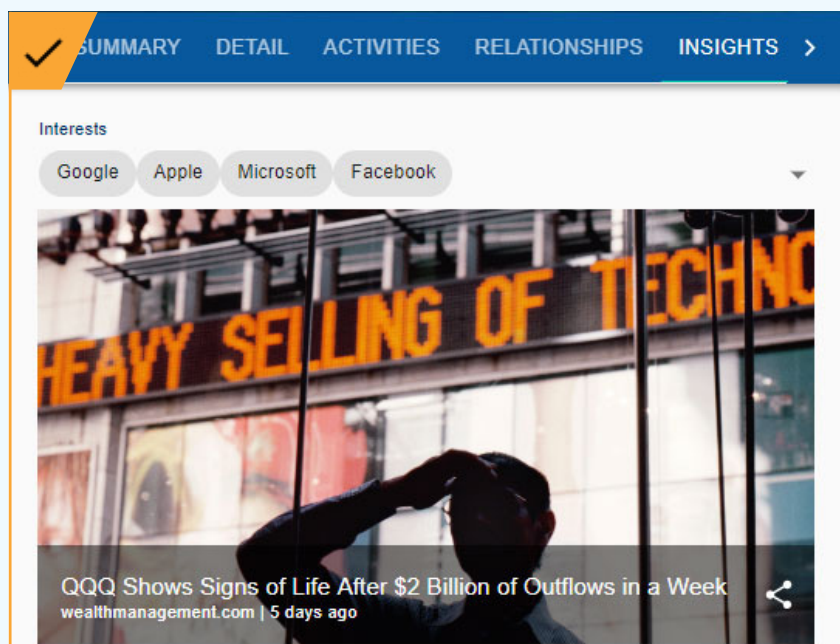
By using opportunity teams, bankers can automatically assign responsibilities to individual users based on their role. These roles can be defined for each opportunity or automatically assigned using business rules that are based on the opportunity type, territory, or other criteria.

To heighten collaboration around opportunity management, teams can use the Deal Chat Room to have key discussions (e.g. sales strategy). In addition, team members can receive notifications that help them stay on top of key developments throughout the opportunity lifecycle.

The Opportunity & Deal Management functionality provides dashboards which include actionable insights into the sales pipeline across regions, product lines, and teams. Our flexible security model enforces compliance rules to restrict access to deals when necessary.

The Value Our Opportunity & Deal Management Capability Can Provide You:

- ▶ Drive opportunity identification to close business faster and increase revenue.
- ▶ Drive collaboration and efficiency.
- ▶ Increase the number and size of opportunities.
- ▶ Increase success for clients via best practices.



Designed to provide bankers with opportunities for interactions throughout the buying journey, our [Insights](#) capability leverages demographic, transaction, and account information via our data aggregation capabilities. Through its Artificial Intelligence (AI) engine, it matches each client profile with relevant digital engagement content from more than 15,000 global news publishers.

Key Features Include:

- ▶ **Provide bankers** with opportunities for interactions throughout the buying journey.
- ▶ **Leverage demographic and account information** in CRM and integrated back-office systems.
- ▶ **Create a unique interest graph** for each client.
- ▶ **AI engine** that matches a client's profile with relevant content from more than 15,000 global news publishers
- ▶ **Prompts bankers** for proactive interactions.
- ▶ **Attaches content** to entities in NexJ CRM, such as opportunities.

The Value Our Insights Capability Can Provide You:

- ▶ Build a strong relationship through a value-added client experience and influence the client's journey.
- ▶ Engage in meaningful client interactions at the right time between financial transactions.
- ▶ Identify new opportunities for sales and service.

Our Technology

Designed to help our capabilities run at full capacity, our key technology components help drive our CRM forward.



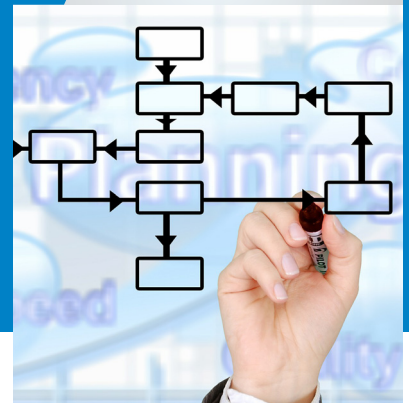
Deployment



Integration



Workflow



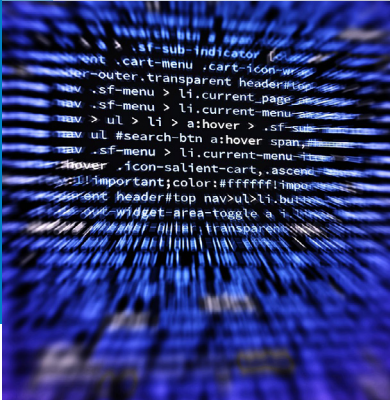
We provide you 3 flexible deployment options to accommodate your firm's business needs: on-premise, hybrid and private cloud. We will also provide you a secure solution with full ownership of your data. Our point of differentiation is that your data is never co-mingled with that of other customers.

With our focus on integration and the customer experience, our [CRM for Corporate Banking](#) product addresses the challenges around processing large volumes of data from existing systems by providing bankers with a consolidated, easy-to-use interface. This, in turn, drives adoption rates.

Our rules-based SmartForms, workflows, and activity plans are designed to standardize and automate scheduled and ad hoc processes. Not only do these tools reduce risk levels, resulting from human error, they enable bankers to focus on revenue-generating activities.



Rules Engine



Our rules engine, designed to enforce business rules company-wide, can be defined at any layer of the platform. Events, UI navigation, or business model updates, can set these rules in motion. Rules can be configured for our key capabilities and features, including: alerts & notifications, workflows, coverage, categories & custom fields, NexJ Nudge™ and data validation.



Security



Based on visibility rules, our dynamic, flexible, and centralized security model will allow you to share information without worry. Founded on industry-wide standards, it allows us to directly map to existing security models and leverage existing entitlements models. Security rules are enforced by our main server and are centrally defined in the Business Domain Model. This way, they are applied across the board, regardless of your UI or access method.



Compliance



Designed to address the constantly-changing regulatory environment, our compliance capabilities can help organizations that are under increased pressure comply with fiduciary and regulatory requirements. That's where our extensive experience working with leading global financial institutions comes in. Not only do we specialize in helping firms meet their regulatory obligations, we can also help them meet local and regional policies and standards.

Our Benefits

✓
Speed up time-to-revenue by streamlining onboarding from data entry to approval

✓
Offer the best recommendations via the right channel at the right time

✓
Increase client loyalty and grow your revenue

✓
Drive revenue predictability and optimize processes

✓
Identify and drive upsell and cross-sell opportunities

✓
Demonstrate regulatory compliance

✓
Grow high performing bankers

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Business is about Relationships®

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Our Success



Recognized as a CRM Expert, 2019



Cool Vendors in Customer Service Strategies, Gartner



Best in Class for Workflow Management & Advisor Experience



Top 250 Canadian ICT company



2013 CRM Watchlist



Gold for Best Cloud Computing & Gold for Best Mobile Solution

Gartner

"NexJ Systems brings extensive domain knowledge in the financial services sector, as well as strong CRM functionality to NexJ CRM"

Banker's Guide to Wealth Management Front-Office Systems, November 2017

FORRESTER

"NexJ has deep functionality for wealth management, private banking, corporate and commercial banking, capital markets, and insurance"

Vendor Landscape: The Growing Demand for Vertical CRM Solutions, November 2016

CELENT

"NexJ is one of the industry leaders for its implementation and application of AI across its platform"

XCELENT Awards 2018, Ranking the CRM Technology Vendors for Wealth Management, May 2018

Aite

"NexJ's Wealth Management CRM is Tops for Functionality & Technology"

Next-Era Wealth Management CRM: Technologies to Acquire and Engage, May 2017

NUCLEUS RESEARCH

NexJ is recognized as expert for focus on industry-specific CRM

CRM Technology Value Matrix 2H17, October 2017

Conclusion



With customers on virtually every continent, [NexJ](#) has become the choice of global market leaders. Our presence is fostered by our knowledge of regional markets and local industry trends, as well as overall industry experience.

As a result, we have become a trusted partner for CRM products by a number of corporate banking firms because of our deep domain expertise, next generation technology, strategic investment in innovation, and strong commitment to customer success.

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*Business is about **Relationships**[®]*

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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!



As an active part of the social community, we encourage you to stay connected! Join us on [LinkedIn](#), follow us on [Twitter](#), subscribe to our [YouTube](#) channel, or like us on [Facebook](#).



NexJ CRM for Corporate Banking

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