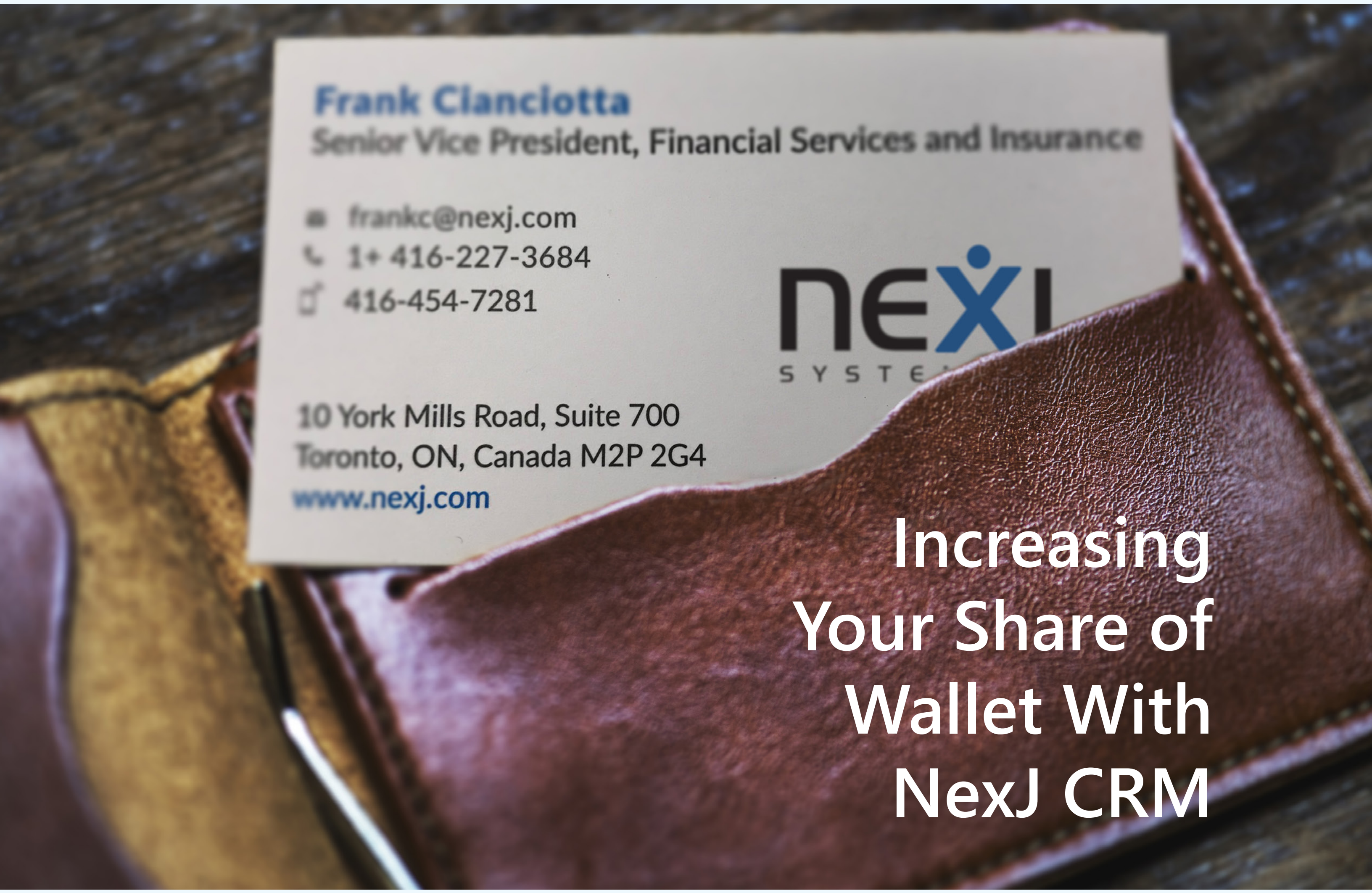
NexJ CRM for Commercial Banking

Why Leading Bankers Trust Us



*Business is about **Relationships**®*

www.nexj.com

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Introduction

NexJ Systems, the pioneer of Intelligent Customer Management, is the trusted partner for CRM products by global commercial 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 has come from 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 commercial banking product that is tailored to help you meet your business objectives. CRM for Commercial 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 commercial banking product can help bankers build relationships, save time, and increase revenue.

Our Value

Save Your Time

Streamline processes such as guided account planning, opportunities, and call reporting 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, and 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

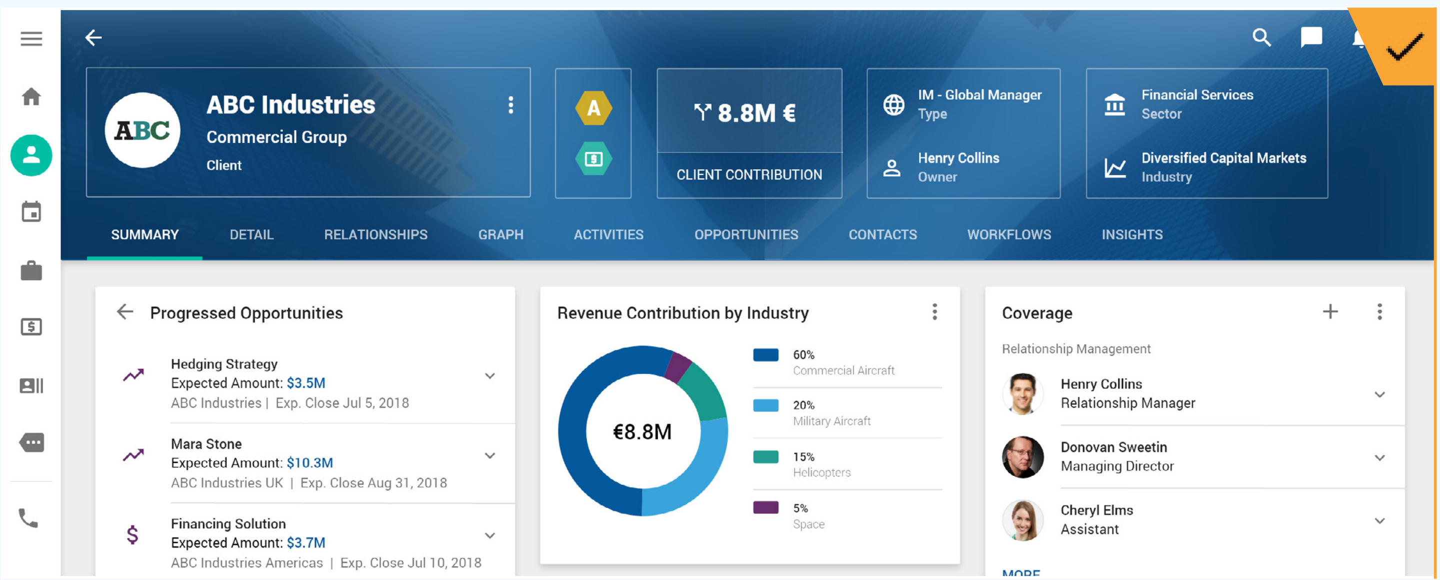
Increase your number of opportunities, leads, cross-sells, and referrals, speed up your time-to-revenue through onboarding, and secure your clients’ loyalty to grow your share of wallet.

Our Capabilities

Comprehensive Customer View

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

By consolidating information across sources, it allows bankers to create a single point of truth that is shared across all product lines. 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, and etc.
- **Quick Notes:** Enables bankers to capture and view notes about the contact.
- **Custom Fields & Categories:** Allows bankers to collect extended profile information.

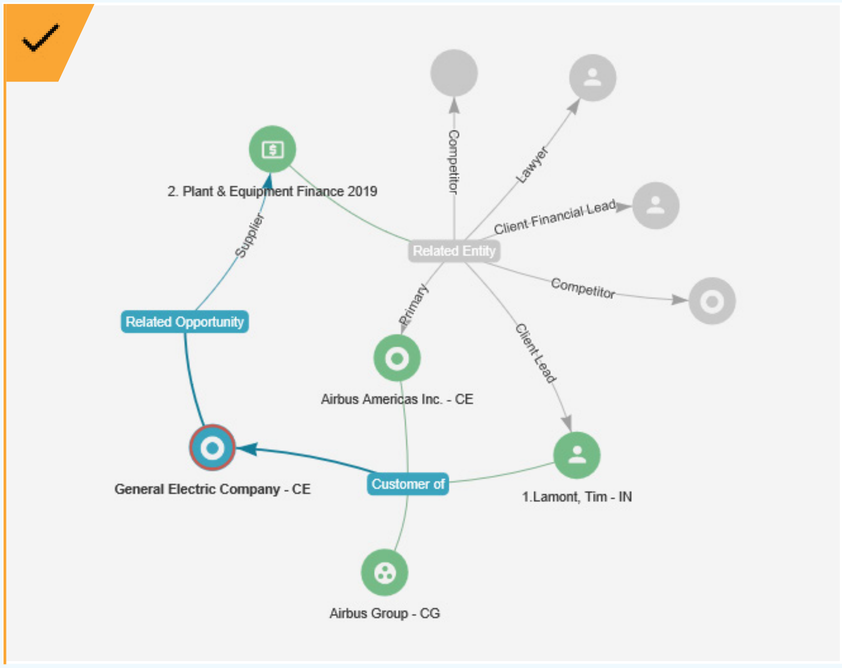
The Value Our Comprehensive Customer View Can Provide You:

- Drive referrals and opportunities to increase proposals and close deals.
- Increase upselling and cross-selling by driving client loyalty.
- Enhance face-to-face client experience 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 an organization which can be used to drive cross sell opportunities across regions.



Key Features Allow You To:

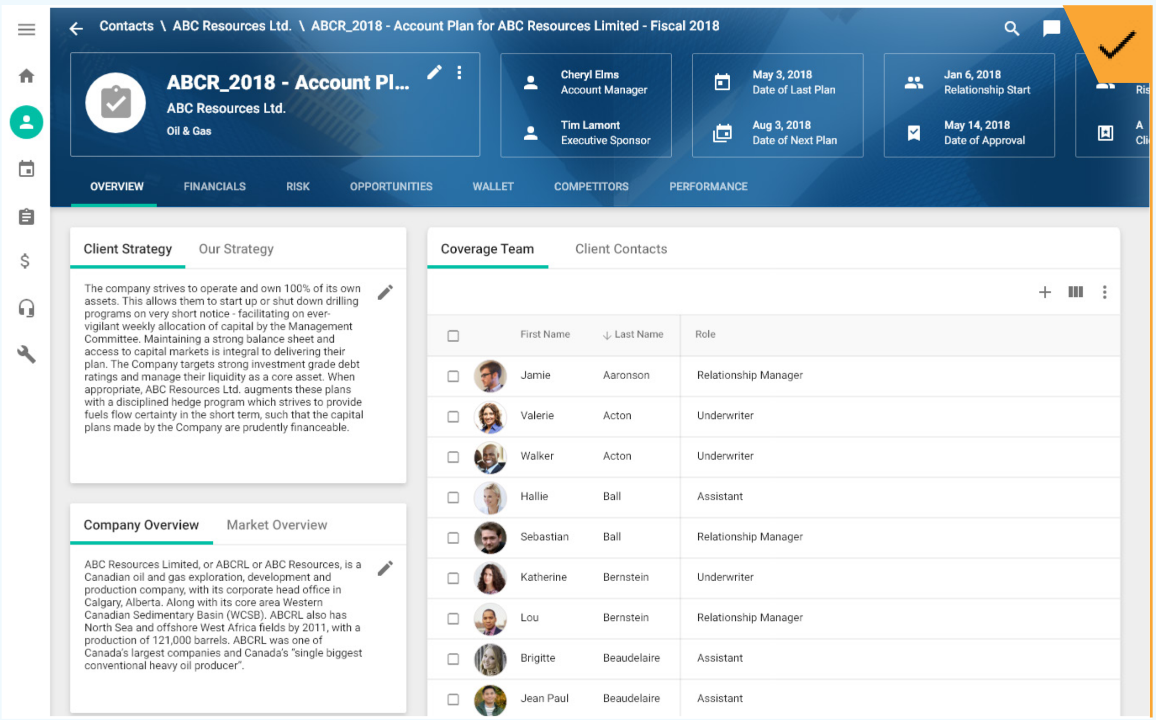
- **View and manage** purchased financial products, accounts, holdings, and related transactions for each client, across their entire organization.
- **Aggregate data in real-time**, offering a complete view of the client's total value and rolling up account information along defined hierarchies.
- **Generate 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 commercial bankers streamlines the end-to-end process of opening, planning, and reviewing company accounts. In particular, it helps guide data capture and the data validation process (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.



Key Features and Benefits Include:

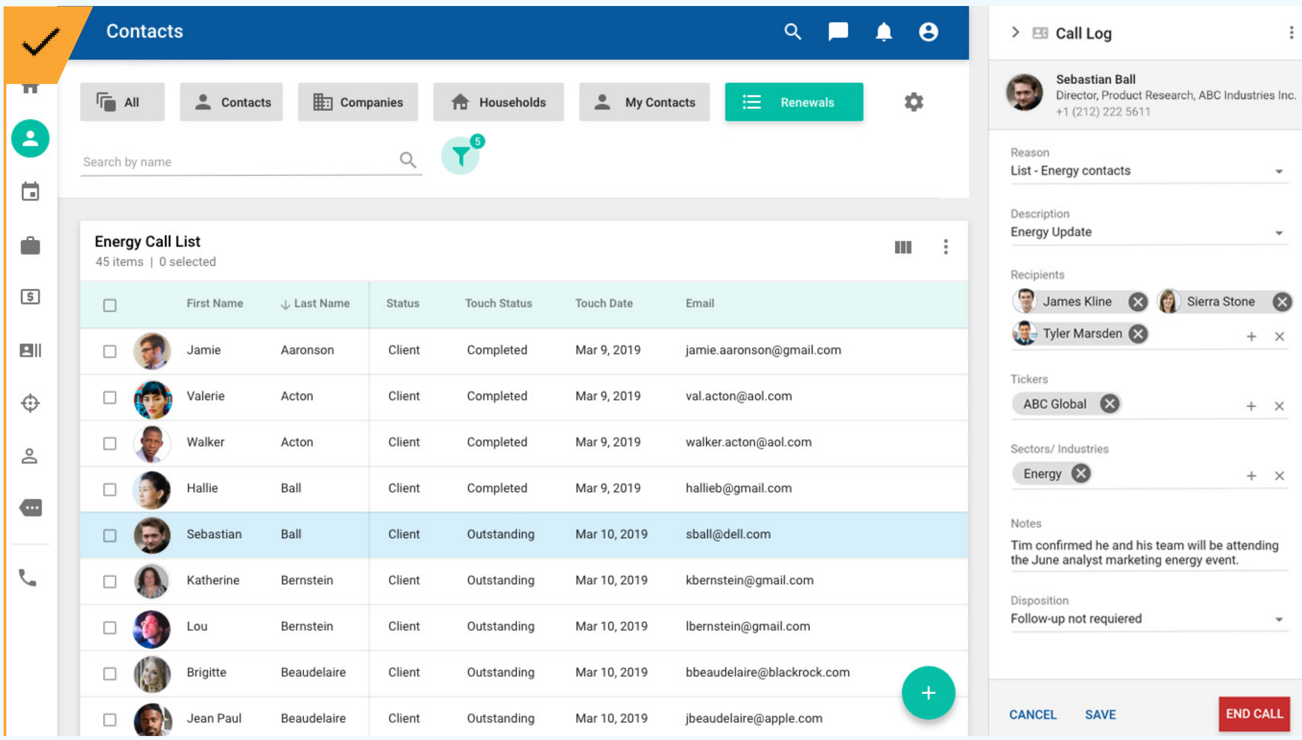
- **Accelerated Approval Processes:** This functionality automatically routes completed forms to approvers.
- **Activity Plans and Service Level Management:** Automates and Standardizes regular account review and planning processes through a set of sequenced tasks and schedule items assigned to bankers and product specialists.
- **Electronic Data Collection and Transfer:** Prevents errors and ommissions, 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
- Expedite the client onboarding process
- Speed up the asset conversion 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.



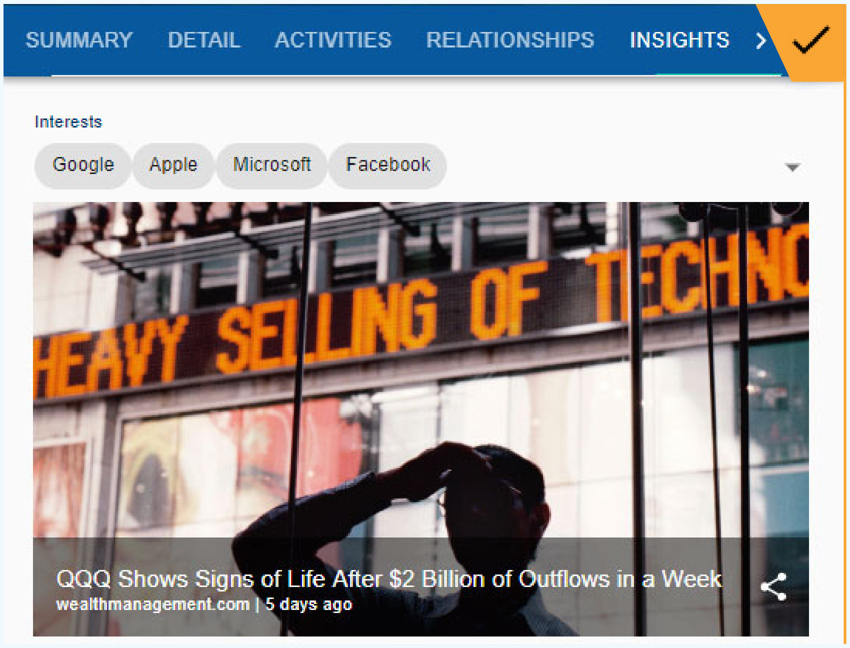
Key Features Include:

- **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 product lines 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

Insights



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:

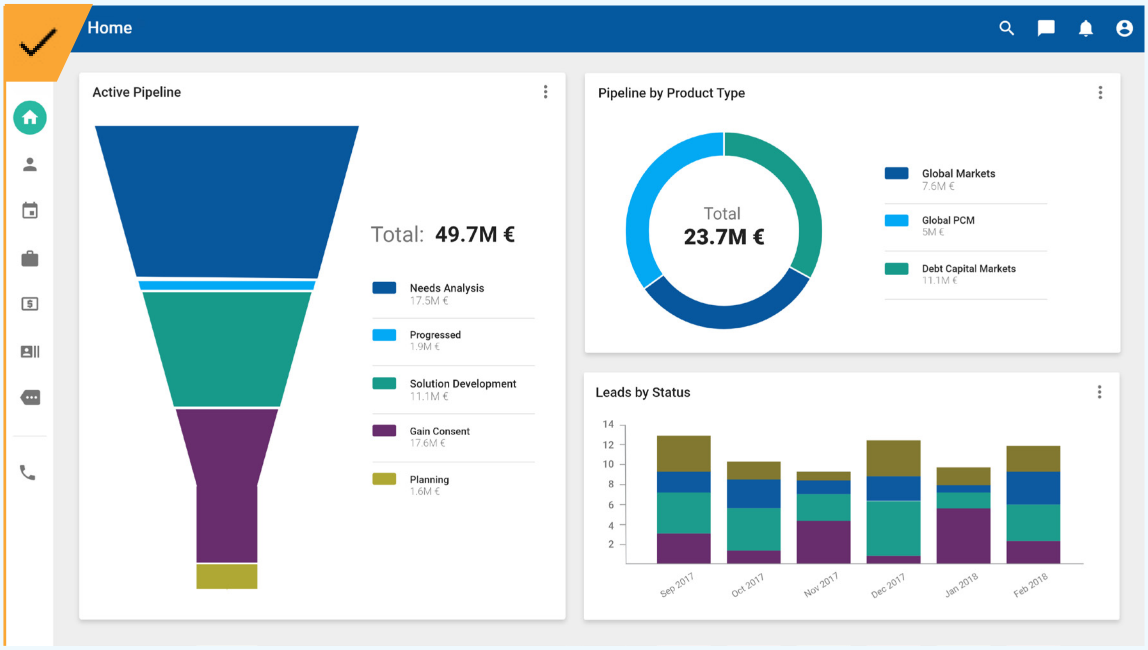
- **Provide bankers** with opportunities for interactions throughout the buying journey.
- **Leverage demographic and account information** in CRM and integrated back-office systems.
- **Create a unique interest graph** for each client.
- **AI engine** that matches a client's profile with relevant content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

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.

Opportunity & Pipeline Management

Our Opportunity Management capability for commercial banking allows bankers to identify and track opportunities from a single application window. Opportunities, which are assigned to clients, can also be tied to a campaign, service request, or entity. This data can then be aggregated along defined relationship hierarchies including client, product, assigned sales representative, or campaign to effectively manage the opportunity funnel.



Bankers can track the sales process from start to finish through our pipeline reports and management dashboards. These summarize interactions, progress, status, and activites across all opportunity stages. To provide bankers with real-time information around leads, opportunities, and accounts, and to consolidate sales information for the sales manager, we provide various reporting and graphical formats. These reports allow you to examine data at a granular level and conduct gap analyses.

From a communications perspective, bankers also have the opportunity to participate in "deal chatrooms" where they can exchange secure messages.

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 institutions via best practices.

Our Technology

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

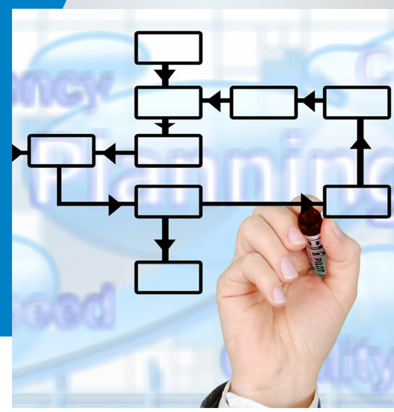
Deployment

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.

Integration

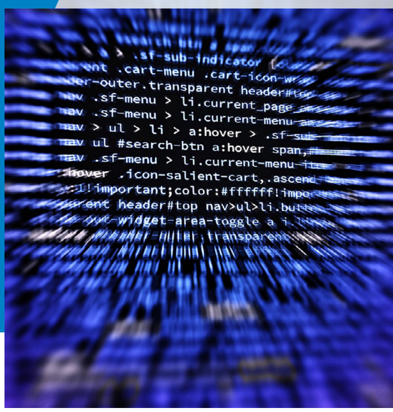
With our focus on integration and the customer experience, our [CRM for Commercial Banking] product addresses the challenges around processing large volumes of data from existing systems by providing bankers with a consolidated, easy-to-use interface. This, in turn, drives adoption rates.

Workflow



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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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 commercial 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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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 Commercial Banking

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