NexJ Private Banking Dashboards

NexJ offers several reporting and graphical formats to provide Relationship Managers (RMs) with real-time information about leads, opportunities, accounts, forecasting, and to consolidate sales information for sales managers. NexJ dashboards allow you to capture and view information as you need, when you need.

Firms can also configure custom dashboards in NexJ CRM for Private Banking, allowing you to leverage this capability to track any information you need. Dashboard components can include zones and tabs for commonly used applications, information, and activities, third-party news feeds or widgets, and dashboard badges to display key information and notifications at a glance.

These client-centric dashboards summarize business-critical KPIs and trends, and transform this data into actionable insight. NexJ Dashboards allow private banks to understand their firrms' health at a glance across several metrics and KPIs. NexJ leverages data from multiple, disparate data sources across your firm to provide dashboard metrics using a wide variety of data visualizations.

Private Banking dashboards include:

- Campaigns
- Activities
- Opportunities
- Pipeline
- Management

Key Capabilities

Role-Based Dashboards

These dashboards are tailored to the user's role and requirements.

Management Dashboards

Managers can view dashboard information rolled-up across their teams.

Parameterized Filters

RMs can specify filter values that better explore dashboard information.

Dashboard Interaction

RMs can interact directly with dashboard charts to explore the underlying data records.

Campaigns

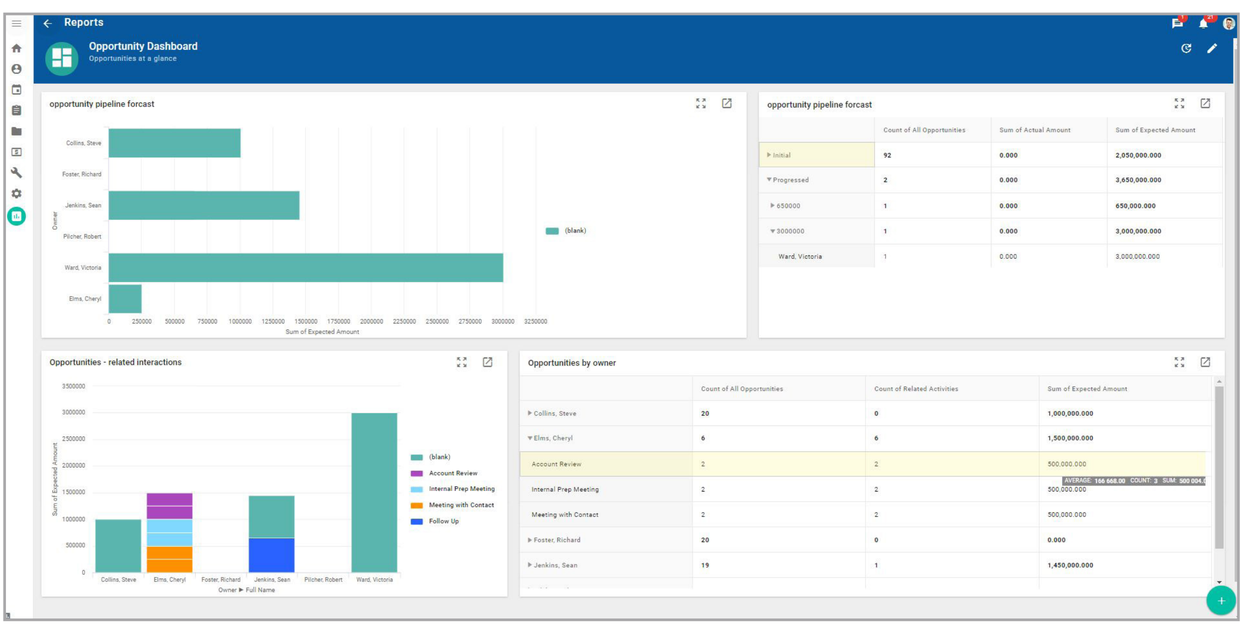
Campaign management graphical dashboards display customer responses, activities, and opportunities by stage. Within the dashboard, users can rollup opportunities or drill down to view the campaign details. Managers can review all activity and create on-the-fly filters to analyze and plan sales activities.

Activities

Activity tracking and analysis dashboards can be used to track the status of many scheduled or proactive client touches. Clients can be segmented with interaction targets for each interaction type and tier. Statuses can be tracked and shown for all tiers. This same mechanism can also be used to track proactive touches.

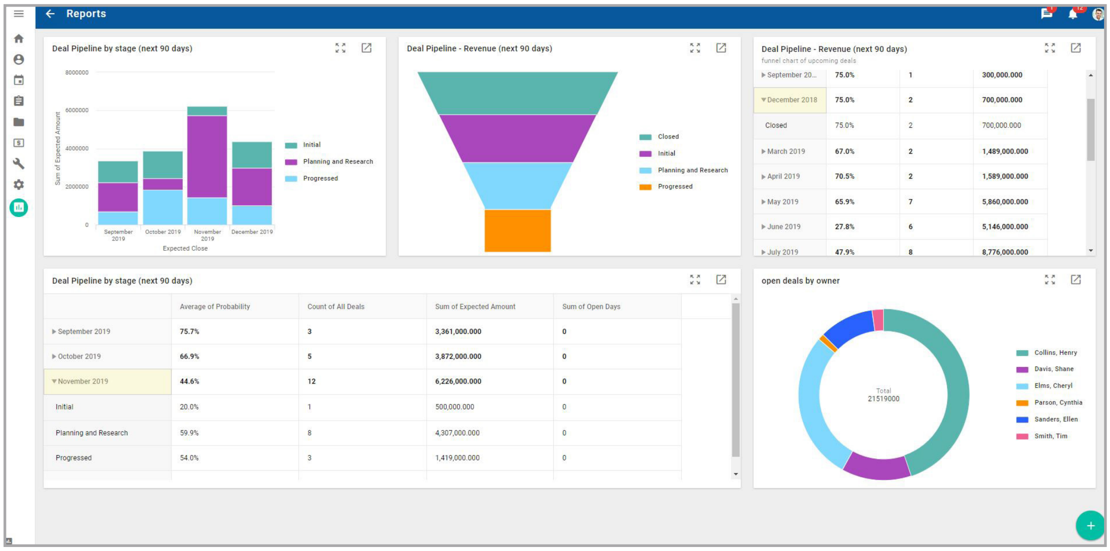
Opportunities

Opportunity dashboards and reports allow RMs to track their progress, status, and activities across opportunity stages.



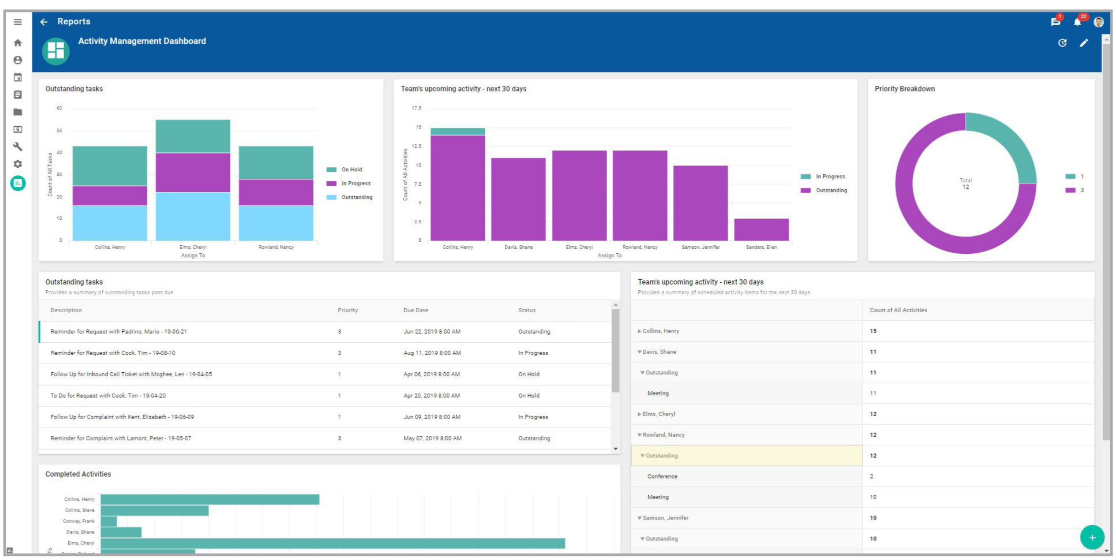
Pipeline

Pipeline reports and management dashboards are available to track and summarize the interactions, progress, status, and activities across opportunity stages for the manager of a team. These allow firms to identify areas that need attention and drill down into detailed reports for further analysis.



Management

Management dashboards such as the "Teams Upcoming Activity," "Total Revenue," and "Lead Conversation Rate by Stage" charts will drive revenue predictability by identifying bottlenecks and optimizing the quality and quantity of leads. NexJ also includes intelligent forecasting capabilities to manage lead distribution and resource allocation. NexJ analytics enable managers to gain insight about how many leads and prospects are distributed, and view metrics on successful conversion rates, time to convert, etc. per branch and RM. Managers can use these analytics to understand capacity, forecast demand, and determine the appropriate recipients for the next batch of leads.



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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.