

News and Research Recommendations



NexJ Systems offers a number of digital engagement features to help financial services firms engage productively with clients at every stage of the client journey. With just a few minutes per week, NexJ Insights, paired with Grapevine6 capabilities, enables firms and their client-facing employees to:

- Engage meaningfully with clients at the right time in the client journey
- Deliver a superior, value-added customer experience between financial interactions
- Build and maintain a stronger, more influential online brand
- Collect data to calculate ROI on social marketing and refine future campaigns

Firms can also generate more revenue by leveraging these abilities to:

- Identify new opportunities for revenue through rule-driven alerts
- Track anonymous clicks on shared content and present targeted offers to readers, tailored to their unique interests

How It Works

NexJ builds a unique interest graph for each customer or user that reflects all the information the firm has, including demographic data, transactions and holdings, interests, and area of expertise.

A sophisticated Artificial Intelligence engine matches documents to user and client profiles to deliver content uniquely tailored to each recipient. These documents include internal documents, such as research and training documents; publicly available content, including news articles and press releases from more than 15,000 publishers; and client-purchased content.

All content is filtered through an AI compliance engine prior to distribution to ensure the document, and any accompanying commentary from the employee, complies with financial and fiduciary regulations. Approved content is then made available to the appropriate individual(s), channel(s), or the CRM solution.

Key Benefits

Build a stronger brand

for the firm and employee by enabling employees to share approved content to the web, social media, and e-newsletters

Save time and improve service

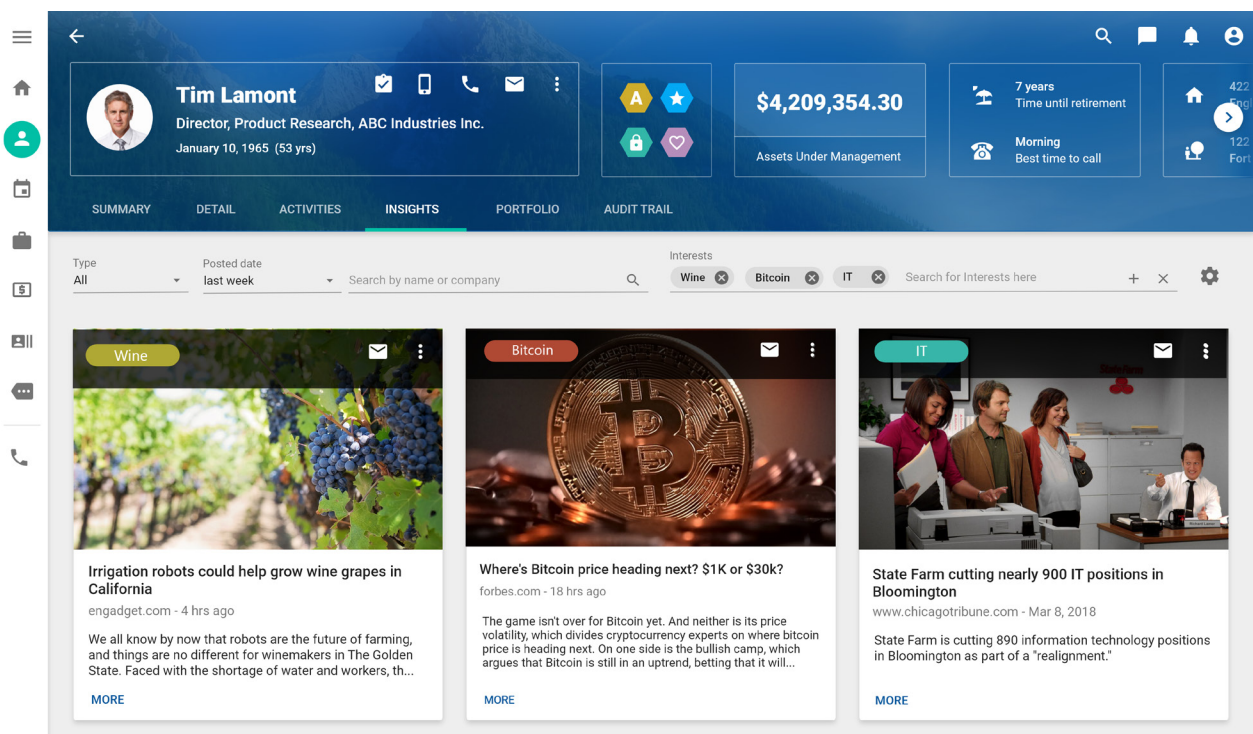
by automating the selection and delivery of pre-filtered content tuned to the employee's area of expertise and each client's unique profile

Differentiate on client experience

by delivering relevant and meaningful content to clients on the platform of their choice

Increase share of customer wallet

by enabling regular, proactive interactions with clients



NexJ offers the following digital engagement and collaboration services:

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Today's digital consumer expects to direct the buying journey. NexJ Insights is embedded in NexJ CRM to provide users with opportunities for interactions throughout the buying journey.

NexJ News and Research Recommendations leverages demographic and account information in CRM and integrated back-office systems to create a unique interest graph for each client, whether it be an individual or company. The AI engine matches the profile with relevant content from more than 15,000 publishers and exposes it in the Customer Insights tab, delivers it to NexJ CRM to prompt users for proactive interactions, or attaches the article to an entity in NexJ CRM, such as an opportunity.

Users can use this information to build a strong relationship built on value-added interactions, influence the client journey, and identify new opportunities for sales and service.

Grapevine6

NexJ has partnered with Grapevine6 to aid you in:

Building Your Social Brand

The hardest part of building and maintaining a social brand is finding the right content to share. Grapevine6 provides this functionality through a mobile app that enables users to select and post regular, value-added content with an investment of just a few minutes per week. With this, users can create a strong brand that represents their personal and professional interests and expertise.

An AI algorithm aggregates and analyzes existing social media posts from subscribing employees and companies. Users can view a graphical summary of appropriate content tags and, at any time, add or delete tags, and change the weight of each category to fine tune the type of content delivered.

Upon log-in, users are provided with a list of suggested content. Users can preview a summary that includes the title and source of the article, click through to read the entire article immediately, or save the article for future review. Users can schedule posts on the channel of choice, including blog, website, email newsletter, or social channel, and Grapevine6 will automatically publish them at the optimal time.

Managing Your Leads

Timing is everything in lead management. Grapevine6 acts as a lead harvesting engine by searching publicly-available documents for new opportunities. The AI engine uses a matching algorithm to find 'money in motion' events, such as mergers, IPOs, executive appointment announcements, etc. It then extracts relevant information such as the names of individuals involved, company names, and geographic location.

NexJ creates a digital lead card for each event that includes the extracted information and routes it to the employee with the relevant expertise or location to best work the lead. The employee can accept or reject the lead.

Grapevine6 provides follow-up activity options for each lead, such as connecting via social media or finding the lead's email address. Users are also provided with historical articles about the individual and company to personalize interactions.

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.

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