

NexJ Nudge is a robust next best action engine that equips advisors and bankers with data-driven prompts to help drive efficiency and meet their firms' goals. In Wealth Management, it assists advisors in increasing assets under management and, in commercial and corporate banking, helps generate cross-sell and up-sell opportunities. Nudge is a module of our award-winning CRM specifically designed to initiate and automate dynamic client interactions, enabling advisors and bankers to offer customers more effective service.

Why NexJ Nudge Makes Sense

NexJ Nudge boosts advisor and banker performance to drive customer success. It is a robust next best action engine that prioritizes interactions while providing advisors flexibility to focus on key metrics they feel are important to them. In short, it enables advisors to perform the right action at the right time, using the right channels.

How NexJ Nudge Works

Here's how NexJ Nudge provides the very best selection of actions available to an advisor or banker:

- It generates, scores and ranks actions based on best practices
- It provides users with choices and helps them perform actions
- It tracks and puts out alerts related to important compliance issues

Key Benefits

Efficiency

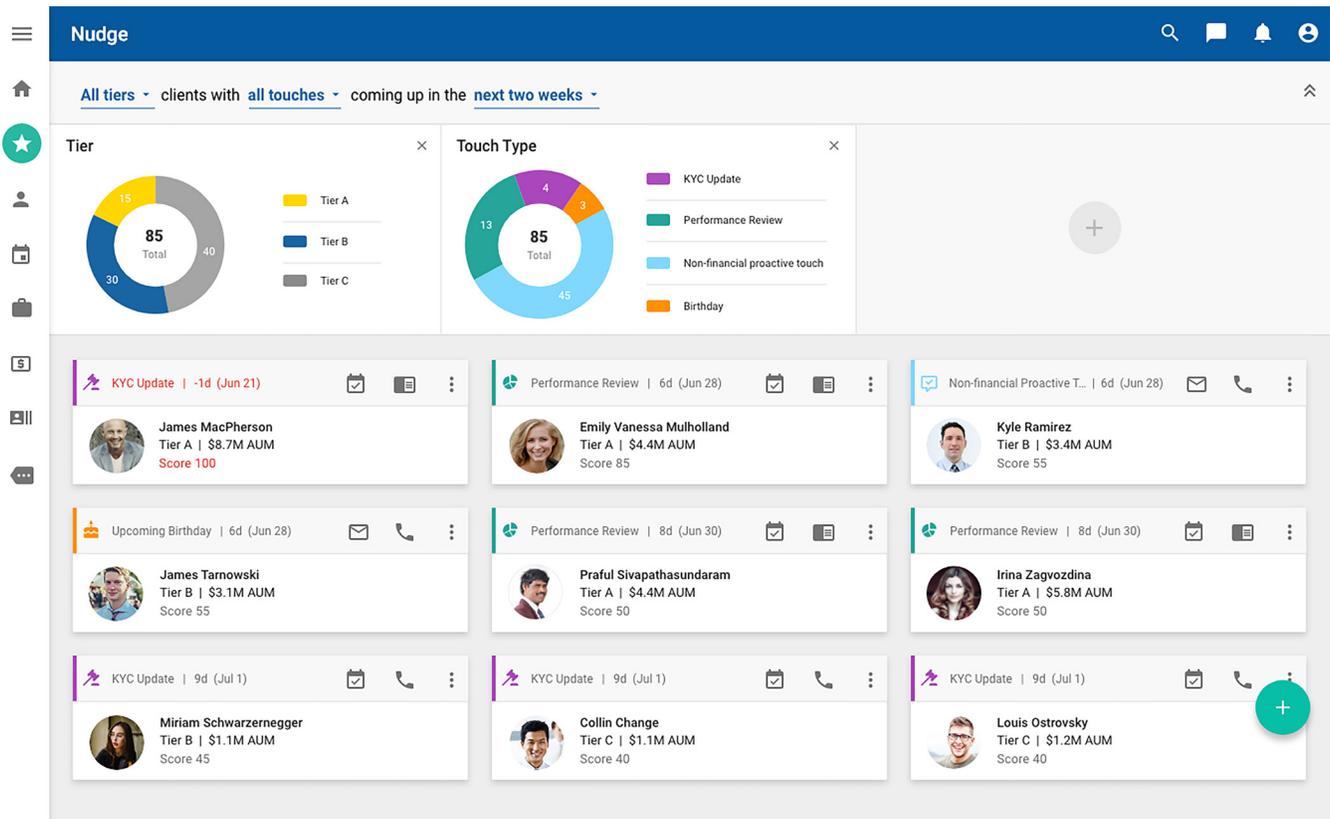
Dramatically increases advisor efficiency by recommending actions and automating tasks

Stronger Relationships

Helps foster better customer relationships by recommending appropriate actions

Compliance

Can keep regulatory frameworks in mind and issue alerts effectively



The process of implementing NexJ Nudge begins with a complete understanding of the customer. This exhaustive client profile is created by integrating all customer data into a Comprehensive Customer View. It then facilitates these among other recommended actions:

- KYC review: It can schedule meetings, prepare documents, pre-populate forms and automate processes.
- Non-financial touchpoints: It can recommend relevant content via NexJ Insights.
- Financial reassurance: It can auto-create call lists of clients that need to be contacted depending on fluctuations in market conditions.

Choosing the Next Best Action

Financial services organizations can effectively leverage NexJ Nudge because it has been developed to provide advisors and bankers with data-driven recommendations, empowers them to improve client outcomes, while automating tasks and processes, all in real time. Interactions are prioritized and recommendations made by recognizing that consumers want to be treated as individuals with distinct preferences. NexJ Nudge empowers advisors and bankers to determine the next best action that can leverage their competitive assets, using data and analytical insights to serve customers in a more relevant and contextual manner.

“NexJ is one of the industry leaders for its implementation and application of AI (i.e., NLG, chatbots, etc.) across its platform.”

— Celent report on ‘Ranking The CRM Vendors For Wealth Management’ by Ashley Globerman, May 2018

Results
35 days before due date

100
90
80
70
60
50
40
30
20
10
0

CONFIGURATION **ADVANCED**

4 items | 0 selected

<input type="checkbox"/>	Name	Days before due date	Days after due date	Weight
<input type="checkbox"/>	Birthday Mailer	1	100	100
<input type="checkbox"/>	Account Review	2	90	100
<input type="checkbox"/>	KYC Update	20	89	100
<input type="checkbox"/>	Client Update	3	78	100

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



NexJ Systems Inc.

10 York Mills Road, Suite 700,
Toronto, Ontario M2P 2G4

P: 416 222 5611 F: 416 222 8623
info@nexj.com www.nexj.com

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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