Intelligent Customer Management

NexJ SYSTEMS ®

Your competition is embracing the benefits of Artificial Intelligence (AI). What about your bankers? How can you ensure your bankers are as smart as they can be? Corporate and Commercial banking firms can benefit in numerous ways by adopting intelligence into their client management strategies, such as:

- Drive revenues using AI-powered CRM capabilities and guided account planning with machine learning
- Improve collaboration to find and win new opportunities
- Reduce operational costs through productivity enhancements

With NexJ Intelligent Customer Management, corporate and commercial banking firms can use AI to increase their understanding of each client. This allows them to deliver highly personalized experiences that increase loyalty and optimize value.

With process automation for basic tasks, AI-powered workflows that embed best practices into user procedures, and the delivery of client insights and next best actions surfaced in NexJ CRM, users can focus less on administration and planning, and more on sales and service. This provides productivity improvements, reduces operational costs, and drives revenue.

Firms who have adopted AI in their client management have seen productivity, process, and client service improvements. Firms that delay the introduction of intelligence into their client-facing activities are in danger of falling dramatically behind the competition for share of client wallet.

> *"NexJ is an industry leader for its implementation and application of AI (i.e., NLG, chatbots, etc.) across its platform, as well as its digital engagement features, including NexJ Publish and NexJ Insights."*
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> - Celent Report
>
> Ashley Globerman, Analyst, April 2018

NexJ Intelligent Agent

Intelligence Built-In:

The following are examples of NexJ's intelligent features:

NexJ Publish

NexJ Referral Management

Improve cross-regional and cross-product opportunities by making it easy for users in different regions and with different specialties to share valuable client intelligence and work together on opportunities. By using NexJ's configurable Rules Engine to specify coverage management, referral management, and actionable notifications, firms can make it easier for users to collaborate, increasing user adoption.

NexJ Insights

Provide bankers with insights to help them understand their customers and close opportunities. Additionally, personalize proactive non-financial interactions using AI to curate engaging content and prompt bankers to send relevant news and research to clients and prospects.

NexJ Publish

Enable bankers to build a stronger brand by suggesting value-added content relevant to their expertise and client base. Users can schedule posts on the channel of their choice, including blog, website, email newsletter, FaceBook, Twitter, or LinkedIn, and NexJ will automatically publish them at the optimal time.

NexJ Next Best Actions

Improve client service and loyalty by recommending the next best action for your client, based on the client's unique journey. As activities are completed, the next activity is automatically created in NexJ CRM, and assigned to the appropriate person. This ensures best practices and processes are followed.

NexJ Intelligent Agent

Allow bankers to work smarter and faster by having NexJ's chatbots take care of simple yet time consuming tasks. Chatbots can search and display clients, events, or research; build lists; schedule meetings; or suggest news and research materials for an opportunity. For example, users can request a meeting verbally or through chat, and the chatbot will find the best available time, schedule the meeting, and send invitations to attendees.
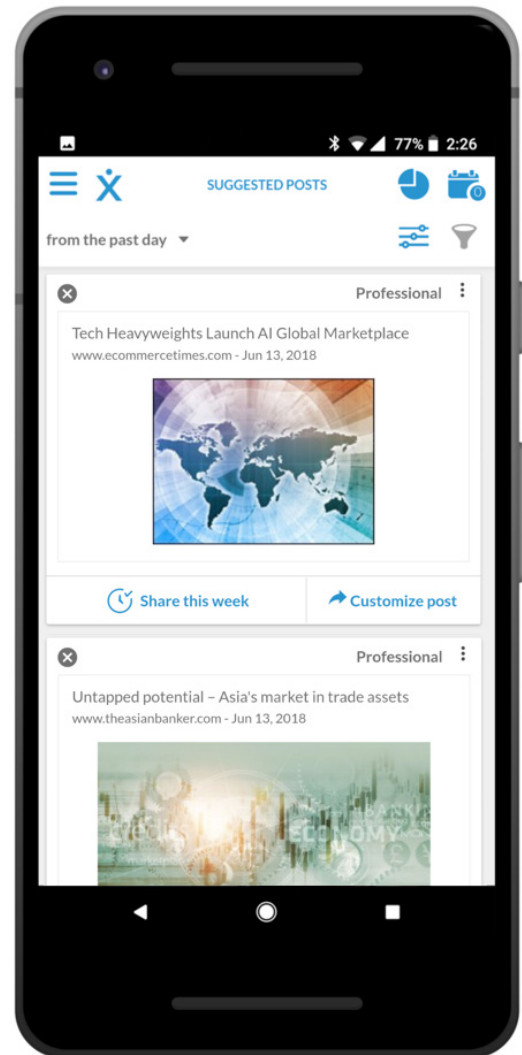
NexJ Cognitive App for Institutional Banking

Through the combination of the embedded intelligence in NexJ CRM and CPM, NexJ's cognitive services, and machine learning through NexJ CDAi, NexJ provides a Cognitive App for Institutional Banking.

With NexJ, firms can leverage machine learning to better understand customers, their relationships, and trade corridors, and to identify patterns of actions that are proven to increase share of wallet. NexJ can use this data to recommend products and services for the account plan, based on buying patterns and the client's existing products. The NexJ Cognitive App can provide the appropriate research and, through machine learning, recommend the right steps and team to close a deal. Market data monitoring notifies bankers when events happen that may alter the deal and advises of the appropriate action to take.

About NexJ Systems

NexJ Systems is a provider of Intelligent Customer Management software for the financial services industry. The Intelligent Customer Management suite is comprised of NexJ's award winning-products that use artificial intelligence to optimize customer management and increase advisor productivity, and cognitive applications that use machine learning to recommend the right actions to work smarter and faster.

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