

# Adopt an Evolutionary Approach to Your Siebel Systems Migration



The typical financial services or insurance organization has a large investment in outdated systems that are critical to the company's operations. For many companies these systems are expensive to maintain, difficult to upgrade, or out-of-date but deeply integrated or customized environments make it difficult to upgrade to a modern system. These companies feel as though they're caught between a rock and a hard place. Saddled with a costly, inefficient system, they risk falling behind the competition. A total "rip and replace", on the other hand, has its own share of risks, including customer service disruptions, user dissatisfaction, delays and budget overruns.

Fortunately, NexJ Systems offers large financial services or insurance organizations a safe and affordable option to modernizing systems that mitigates the risk and complexity associated with large scale upgrades or replacements of outdated systems, including Siebel. NexJ CRM enables organizations to adopt an evolutionary approach to migrating systems. With NexJ, companies can leave data where it lies and integrate existing outdated and third party systems into a proven platform designed for easy integration, customization and upgrades.

Using the NexJ Enterprise Application Platform, companies can access critical data and functionality from existing systems, and migrate seamlessly to NexJ in affordable, controlled phases. This 'best of all worlds' approach allows organizations to leverage their existing IT investment and resources and improve overall adoption and satisfaction, while minimizing disruption and cost.

With NexJ, firms can:

- Modernize with ease
- Evolve with changing needs
- Gain intelligent, AI-powered CRM

## Modernize with Ease

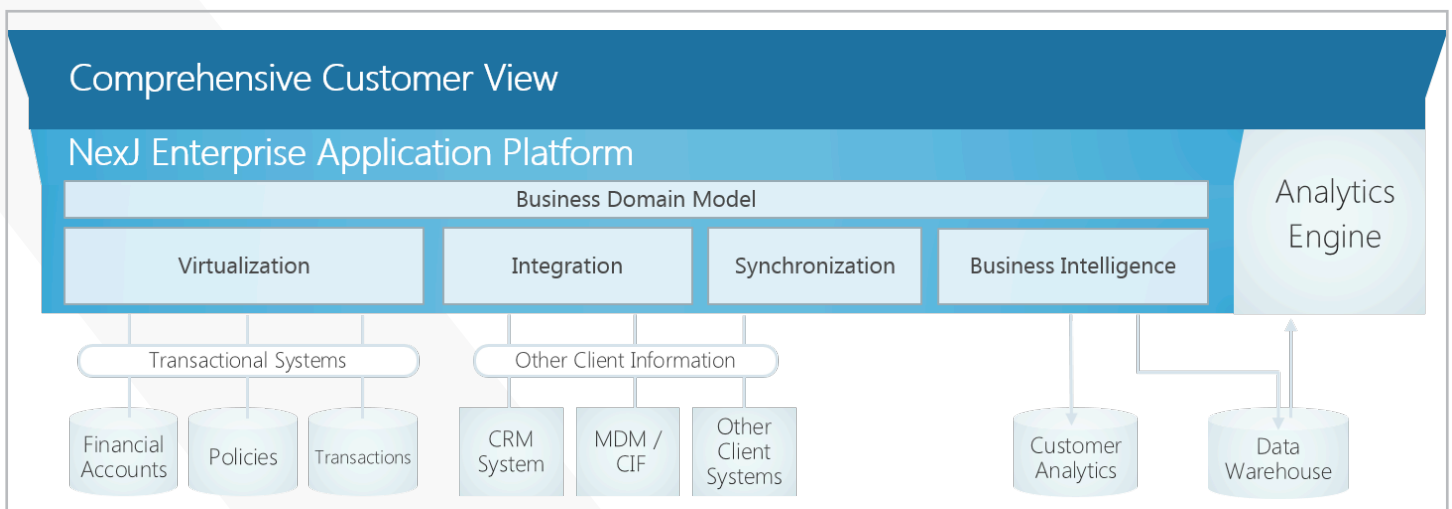
- Adopt an evolutionary approach to system migration to mitigate risk and disruption
- Provide front office benefit today and migrate in controlled phases
- Implement a proven, cost-effective solution that leverages existing data, processes and customizations

## Evolve With Changing Needs

- Maintain competitive advantages with a modern, flexible CRM platform
- Easily upgrade, customize, and integrate with new systems with a model-driven engineering platform
- Maintain ownership of data in a secure deployment

## Gain Intelligent CRM

- Seamlessly integrated desktop delivers AI-powered CRM for the financial services and insurance industries
- Comprehensive view of all customer information enables consistent, pro-active service
- Intelligent CRM and automated workflows standardize processes to drive upsell / cross-sell opportunities
- Intuitive user interface and CRM features enhance user satisfaction and adoption



### ***Move onto a modern architecture today***

An evolutionary approach to system migration requires a common platform for integrating systems and data. A platform allows companies to integrate client information from multiple, disparate sources into a single unified view to deliver efficient, personalized service and to identify cross-sell and upsell opportunities.

The NexJ Enterprise Application Platform is a superior platform for intelligent integrated CRM. It leverages model-driven engineering to provide large enterprises with the tools and services they need to deploy tightly integrated, easily customized and massively scalable enterprise CRM solutions quickly and with the lowest total cost of ownership. The NexJ Enterprise Application Platform enables seamless integration with applications and data stores using pre-built, industry-standard adapters. Companies can maximize their existing investment in technology, consolidate client information without replication, deliver net new functionality in phases and provide immediate benefits to the front office and clients.

### ***Leverage your existing data and processes***

One of the most disruptive aspects of any “rip and replace” is the effort involved in migrating existing data and processes to new systems. An evolutionary approach to migration allows companies to integrate data sources and systems to provide uninterrupted access to the data and functionality users need. NexJ connects to data stores at source, without duplication and integrates with any business applications. Companies can select which investments in data and processes they would like to maintain, as well as the AI-powered functionality they wish to introduce to improve on outdated processes.

Because outdated systems such as Siebel CRM are treated as another integration point, companies can adopt a phased approach to system migration by disabling integration when and if desired.

### ***Evolve with minimal cost and disruption***

Companies must be able to evolve their processes and data capture strategies to keep up with continually changing market conditions. Solutions that can be managed and configured by in-house resources enable organizations to use existing IT resources, control costs and tailor the solution to their exact needs. NexJ’s model-driven engineering platform and integrated development environment make it easy to upgrade and maintain customizations with each new release. Every NexJ product includes NexJ Studio, a powerful and easy-to-use graphical modeling tool that encapsulates development best practices and enables organizations to configure all aspects of their solution in a single, re-usable business model. With NexJ Studio, companies can easily manage the software, evolve it with changing needs, and add new integration points. While traditional application customizations break the upgradability path, NexJ treats these changes as configurations which are preserved in future upgrades.

### ***Choose an industry leader with experienced resources***

Because of the cost and potential disruption of replacing outdated systems, it is vital that companies choose an experienced vendor with a proven solution. Since 2006, NexJ Systems has been delivering intelligent CRM software to finance services and insurance companies with diverse requirements. Industry-leading customers select NexJ as their integrated desktop platform because it can be layered on top of their existing technology infrastructure, seamlessly integrating existing data and systems.

NexJ’s senior management and core architecture teams have more than 25 years of experience developing and delivering integrated enterprise software, including many years together at Siebel Systems. This team founded NexJ to design and engineer software to address the complex information management and process problems facing large financial services and insurance organizations today. In addition, NexJ’s Professional Services team consists of experienced professionals familiar with the challenges of implementing large-scale, highly integrated software.

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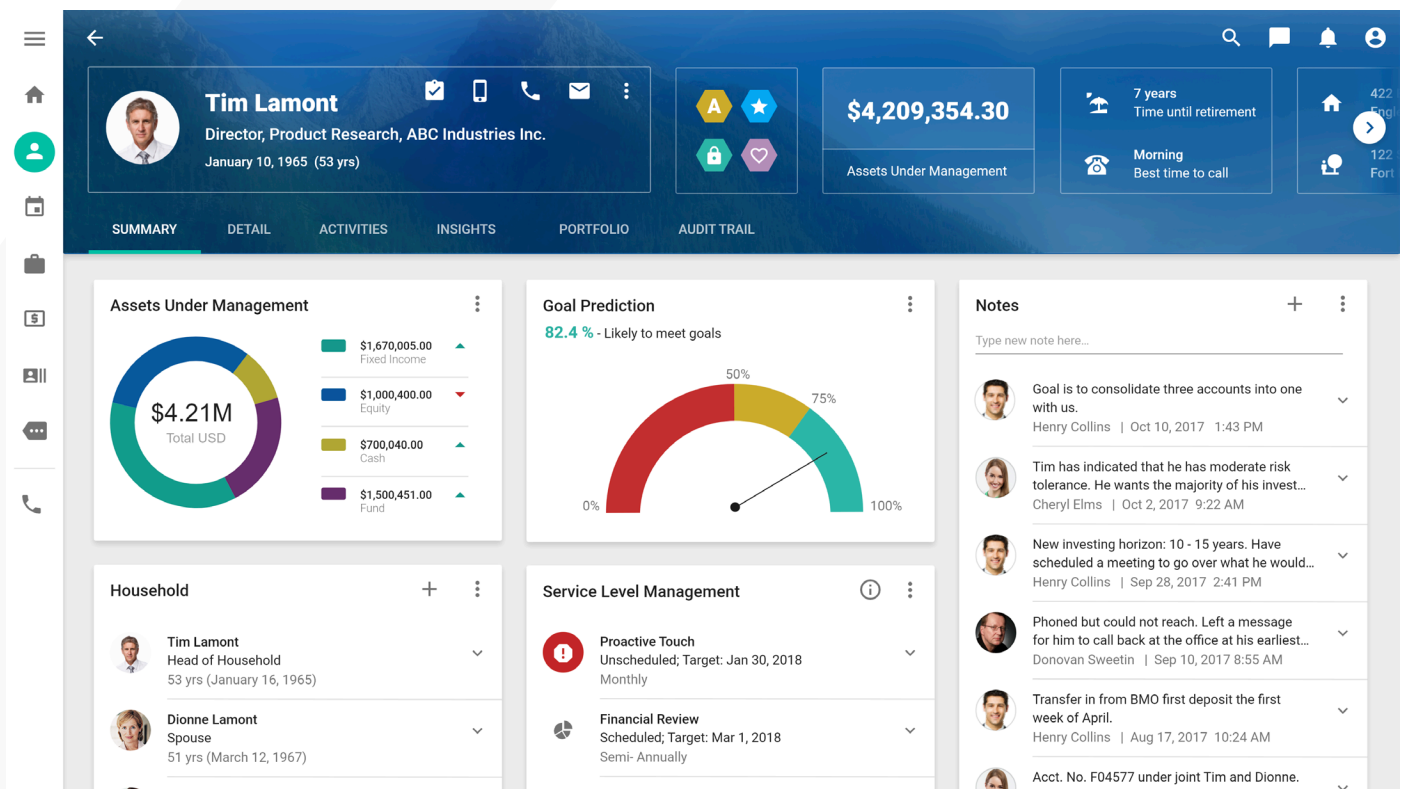
## **Adopt an Evolutionary Approach to Migration**

- Many companies are reluctant to take on the risk and complexity of upgrading to a modern CRM solution despite the fact that outdated CRM systems such as Siebel may be out-of-date with current processes, expensive to maintain, and difficult to upgrade
  - NexJ Systems offers a safe and affordable alternative to the traditional “rip and replace” model of modernizing CRM that enables organizations to adopt an evolutionary approach to migrating systems
  - With NexJ, companies can access critical data and functionality from existing legacy systems and migrate seamlessly to NexJ in phases. This allows organizations to leverage their existing IT investment and resources and improve overall adoption and user satisfaction, while minimizing disruption and cost
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## Modernize or fall behind the competition

The financial services and insurance industries have changed dramatically in the past decade. New technology, interaction channels, legislative requirements, and client expectations have forever changed the way companies do business with clients. A CRM solution that integrates data and functionality from multiple enterprise applications into a common solution is no longer a luxury – it's a must. Modern, seamlessly integrated relationship management software increases efficiencies, drives productivity, and enables users to deliver the consistent, personalized service clients expect. Therefore, firms must find a solution that supports an evolutionary approach to system migration and includes intelligent, industry-leading CRM features.

NexJ CRM, NexJ's intelligent customer relationship management solution, offers the best of both requirements. It provides AI-powered CRM functionality based on financial services and insurance industry best practices versus generic CRM. This functionality is further tailored by line of business to drive user adoption and maximize effectiveness. Our strategic partnerships with leading financial services and insurance organizations guide our product development, which enables all our customers to take advantage of the proven CRM processes of industry leaders.



For more information about NexJ CRM or to learn how NexJ Systems can help you take an evolutionary approach to modernizing your systems, visit [www.nexj.com](http://www.nexj.com) or email [info@nexj.com](mailto:info@nexj.com).



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## 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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