

NexJ Systems is a provider of Intelligent Customer Management software for the financial services industry. NexJ's suite is comprised of our award-winning products that use Artificial Intelligence (AI) 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. Our products include industry-specific Customer Relationship Management (CRM), Customer Process Management (CPM), and Customer Data Analytics & Intelligence (CDAi) all tailored for:

- Wealth Management & Private Banking
- Corporate & Commercial Banking
- Capital Markets
- Insurance

With NexJ, firms can integrate client information from multiple, disparate applications and data sources into a comprehensive view to better understand clients and increase the reliability and efficiency of analytics and machine learning initiatives. The view is coupled with best-of-breed functionality to automate best practices at every stage of the client lifecycle, sell more by providing the right offer at the right time over the right channel, and deliver a unified, omni-channel client experience.

Visit [www.nexj.com](http://www.nexj.com) to learn how NexJ can help you:

- Work smarter and faster
- Save time and make more money
- Increase user satisfaction
- Improve the customer experience

## Key Benefits

### Industry Experts

- Deep domain expertise in financial services
- Solutions tailored for industry sub-verticals
- Large-scale, global implementations

### Architected for the Enterprise

- Seamless integration with existing data sources
- Scalable to tens of thousands of users
- Rapidly tailored to unique and specific client needs

### Strategic Partner

- Responsive to our customers' needs
- Proven track record in partnering with industry leaders
- Committed to our customers' success
- The choice of global market leaders



**"NexJ Systems brings extensive domain knowledge in the financial services sector, as well as strong CRM functionality to NexJ CRM"**

Banker's Guide to Wealth Management Front-Office Systems, November 2017



**"NexJ has deep functionality for wealth management, private banking, corporate and commercial banking, capital markets, and insurance"**

Vendor Landscape: The Growing Demand for Vertical CRM Solutions, November 2016



**"NexJ is one of the industry leaders for its implementation and application of AI across its platform"**

XCELENT Awards 2018, Ranking the CRM Technology Vendors for Wealth Management, May 2018



**"NexJ's Wealth Management CRM is Tops for Functionality & Technology"**

Next-Era Wealth Management CRM: Technologies to Acquire and Engage, May 2017



**NexJ is recognized as expert for focus on industry-specific CRM**

CRM Technology Value Matrix 2H17, October 2017

## What our customers say:

*"Having a product that could be integrated throughout the platform, and not just some stand-alone application that is accessed separately, was key for us."*

*"I just wanted to tell you how much I love NexJ... NexJ has integrated 14 of our systems into a comprehensive view of the customer."*

*"NexJ will provide the state of the art CRM solution that will provide the sales process discipline and connectivity to I&B ... aligning our business across geographies, products and customers and supporting our client-centric proposition."*

*We are very happy and your team has been the best vendor I have ever worked with. On top of this we have already had a successful rollout [in less than 3 months]!"*

**NexJ Customer Relationship Management** differs from other CRM solutions because it integrates any number of disparate data sources into a unified view of all client knowledge and provides specific finance and insurance CRM functionality rather than generic CRM. NexJ's Integrated Desktop solutions, powered by NexJ's CRM products, provide a single source of all the information and tools advisors, agents, and bankers need to deliver superior client service, collaborate effectively, improve client loyalty, and identify and pursue cross-sell and upsell opportunities.

**NexJ Customer Process Management** integrates business process management (BPM) with CRM tools to standardize and streamline client engagement workflows and regulatory procedures across the entire client lifecycle. Using NexJ CPM, firms can increase the accuracy and efficiency of Client Onboarding, KYC and Portfolio Reviews, AML Checks, and Account Maintenance. Dynamic smart forms, workflow, and approval processes collect required information, generate forms, obtain necessary approvals, and uses notifications to prompt users for action. Seamless integration to CRM and back-office systems and advanced scheduling and reporting ensure users stay on top of assigned tasks and review requirements.

**NexJ Customer Data Analytics & Intelligence** is an analytics data pre-processor that enables firms to increase the reliability and efficiency of analytics and machine learning initiatives, even when the data is inconsistent, siloed, unstructured, and changing continually. Firms can create a single, consistent, and complete view of the client once and use it many times. NexJ CDAi will automatically provision up-to-date client data to the application, channel, or analytics project that needs it. In addition, with NexJ CDAi, firms can continually provide current data and analytic insights to machine learning to refine processes and improve the client experience.



Wealth Management  
& Private Banking



Corporate &  
Commercial Banking



Capital Markets



Insurance

To learn more about NexJ solutions, 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 client management and increase advisor productivity, and cognitive applications that use machine learning to recommend the right actions work smarter and faster.

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