NexJ CRM for Commercial Banking

NexJ Systems provides CRM tailored for commercial banking that integrates client information, automates business processes, standardizes client interactions, and identifies opportunities for cross-sell and upsell.

NexJ CRM provides the tools commercial bankers need to streamline their day-to-day tasks, reduce their administrative burden, and empower them to better respond to client's needs. Firms can:

Deliver Superior Service

- Present all information about a client in a single comprehensive view including all client interactions at a company, individual and account level
- Better understand and proactively respond to client needs to deepen relationships and drive loyalty
- Drive relevant, proactive touches that are personalized to the client

Grow Revenue and Share of Wallet

- Gain insight into each client's business and relationships
- Improve collaboration and promote team-based selling to increase cross-sell opportunities and fee-based revenue
- Drive the identification, routing, execution and management of cross-sell opportunities

Increase Banker and Team Productivity

- Streamline key processes and automate best practices including client on-boarding, account reviews and referrals
- Seamlessly integrate banking tools, including portfolio management, loan origination and market news with comprehensive client information
- Allow teams to exchange secure messages, in-context of a client activity, to improve customer service.

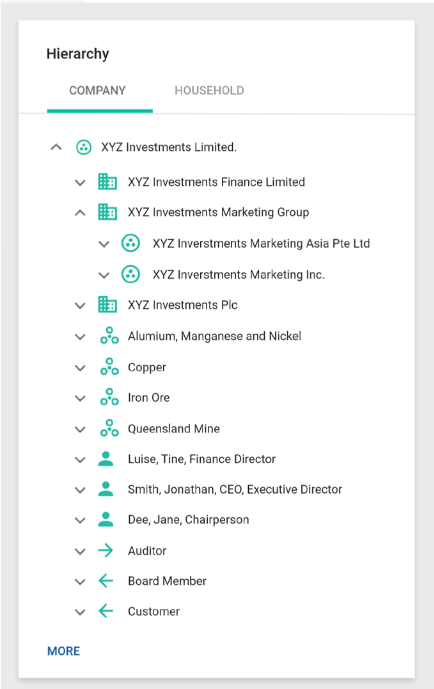
Key Benefits

Increase share of wallet by leveraging a complete view of the client across regions and product lines to identify opportunities and cross-sell

Gain a complete understanding of client profitability and risk by aggregating accounts, holdings, and risk up corporate hierarchies

Become a trusted advisor through deeper client insights to provide superior customer service

Increase collaboration between relationship managers and specialists across regions and product lines by improving information sharing and communication capabilities



Householding & Relationship Modeling

NexJ CRM is an Intelligent Customer Management product that provides best-of-breed CRM functionality tailored for Commercial Banking.

Deal and Pipeline Management

View current sales performance and generate detailed sales reports to visually track and manage performance against sales targets.

Relationship Modeling

Model client-centric relationships across corporations, and spheres of influence to understand client organizations and drive cross-selling and high-quality referrals.

Coverage Team Management

Define a team of users (such as product specialists) responsible for selling and servicing a company or client to ensure efficient and effective customer service.

Client Loyalty

Tailor service levels based on client service tier, profile, interests, and holdings. Ensure compliance with best practices and meet commitments to firm and branch-defined service models.

Microsoft Outlook Integration

Automatically synchronize tasks, contacts, calendar items between Microsoft Outlook and NexJ CRM. Access detailed contact information directly from Outlook so bankers always have the information they need to communicate effectively with their clients and prospects.

Integrated Search

Search across all integrated client data, including profile and asset information to quickly find the contacts you need. Save and share queries at the enterprise, branch, or group levels.

In Context Messaging

Allow teams to exchange secure messages, in context of a client activity, to improve the efficiency of customer service.

Call Reporting with Coverage Team Distribution

Automatically distribute call reports across coverage teams and create follow-up activities.

Client and Team Calendar

Provide a single view of client-specific activities across the firm, ensuring all team members have a holistic view of interactions.

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.

To learn more about NexJ CRM for Commercial Banking, visit www.nexj.com or email 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.