



Transforming Financial Services Sector with Dynamic CRM





Financial Services industry sector is in the midst of paradigm shift. Since the financial crisis, traditionally, revenue challenges have been a cyclical phenomenon. However, there is an eye opening realization that this is not the case. The industry is transitioning from a high-margin business to a lower-margin one.

For businesses, growth is hard to find, revenue is under intense pressure, and the cost of doing business continues to increase. Over the next few years, we expect that two megatrends that will force retail financial institutions to rethink their operating models: digitization, which is de-integrating the front- to back-office value chain; and consumer expectations, which are always rising. Financial institutions will have to invest in technology advances — specifically, cloud computing, mobile, analytics, broadband, and social tools — to meet customer expectations, which are increasingly transforming and shaping the financial service sector across the globe.

THE CHALLENGE

Financial Service industry needs a robust business technology solution to address some of these challenges:

- Help build customer loyalty by delivering consistent, high-level customer service across all channels.
- Identify high-value clients and take advantage of new revenue opportunities.
- Extend the value of your IT investment by integrating with your core systems and existing applications.
- Solutions that are multi-language, multi-currency and highly secure.
- The inability to share information across multiple departments
- Limited vision to cross-selling and up-selling opportunities
- Information silos and no real time accurate business information
- Miscommunication due to decentralized information
- Manual workflows across multiple departments
- Loss of revenue generated opportunities
- Loss of market share and leadership
- Compliance and risk management

POSITIVEEDGE FINANCIAL SERVICE CRM SOLUTIONS



PES Dynamic CRM Solution is designed specifically for Financial Service Sector. It enables insurance agents, bankers & brokers to better leverage their clients' profile and portfolio information to identify cross-sell and up-sell opportunities and improve customer retention.

From retail banking and wealth management to insurance, PES Dynamics CRM can give you a comprehensive view of your customer, so you can:

- Help build customer loyalty by delivering consistent, high-level customer service across all channels.
- Identify high-value clients and take advantage of new revenue opportunities.
- Extend the value of your IT investment by integrating with your core systems and existing applications.
- Enabling Financial Service agents to better leverage their clients' profile and portfolio information to identify cross-sell and up-sell opportunities and improve customer retention.

Benefits with PES Dynamic CRM Solution:

- Capture and track all lead details in one system to identify more qualified leads.
- Take advantage of a familiar interface and native integration with Microsoft Office Outlook to get employees quickly up to speed with CRM.
- Gain insights that help you maximize up selling and cross selling.
- Automate processes to simplify administrative tasks and give you more time with clients.
- Develop new strategies based on real-time information about client interactions.
- Expand opportunities and reduce administrative burden
- Offer services that are tailored to individual needs and preferences
- Increase customer satisfaction and create long-lasting relationships.
- Deliver a single platform for high-touch sales professionals and low-touch Internet channels.
- Promote collaboration internally and externally.

- Provide a holistic view of all institutional client activity.
- Monitor research consumption and trade flows to gain insights that will help you identify additional products that appeal to your clients.
- Integrate existing line-of-business systems with workflows

PES CRM SOLUTION - KEY FEATURES

- Provides a complete and unprecedented 360° understanding of an individual customer's product relationships combined with transaction behavior enabling the most accurate customer decisions and proactive product targeting regardless of customer touch points.
- Provide a rich and detailed understanding of customer characteristics, transaction behavior and product lifecycles across your entire customer base and other sub-groups to improve marketing efficiency, achieve customer satisfaction and maintain customer loyalty.
- Enable business for finer and highly granular customer marketing actions based upon customer scoring and business forecasts derived from advanced predictive analyses.

DASHBOARD AND REPORTING

- Personalize data views, dashboards and navigations
- Import and export Microsoft Office Excel spreadsheets in real-time
- Use built-in traditional or customizable reports with Report Wizard
- Track and measure performance for the organization, business units, teams and individuals
- Use inline visualizations to gain knowledge on key performance indicators (KPI)

Value Proposition

PES Dynamic CRM solution empowers financial advisors with the tools; information and insight to maximize their productivity and help clients achieve their personal financial goals. The solution enables financial advisors to better leverage their clients' portfolio information together with embedded analytics to identify cross-sell and up-sell opportunities, improve customer retention and maximize the value of assets under management.

Mobile and Social Media Platforms



As communications evolve, organizations are taking first steps towards building the next-generation customer management solution platform. They are investing in technology that supports all multi, mobile and social media channels. The need to gain customer insight is critical, enabling organizations to communicate and assist on a more personal level. What better way to accomplish this need than through Positiveedge Solutions coupled with social media and Microsoft Dynamic CRM combined.

About Positiveedge Solutions

Positiveedge Solutions helps customer's design, develop and deploy software solutions for critical customer-facing business challenges. With our uncommon commitment to project success, along with our comprehensive knowledge of Microsoft technologies and backed by broad industry experience and methodologies, we extend core business platforms to create commercial advantage for our customers.

By leveraging our unique onshore/offshore delivery model, our consultants work around the clock to provide solutions quickly and cost effectively, which add measurable value to your business.

Next Step:

Contact us to discuss how we can help with your business needs.

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