HCL CRM WEALTH

A FINANCIAL ADVISOR'S CHOICE
FOR DATA ALIGNED DECISIONS

CRM Wealth, on Salesforce platform, is highly scalable, customizable multi-currency, customer–focused, comprehensive CRM solution from HCL for the Wealth Management firms that stitch together Sales, Marketing, Advisory and CRM functions to help Advisors deliver a superior customer experience and consulting services.

CRM Wealth allows financial advisors with mass affluent clients to swiftly pursue and fully manage the customer lifecycle , plan for financial goals, manage investment portfolios and enrich customer experience on Salesforce platform.

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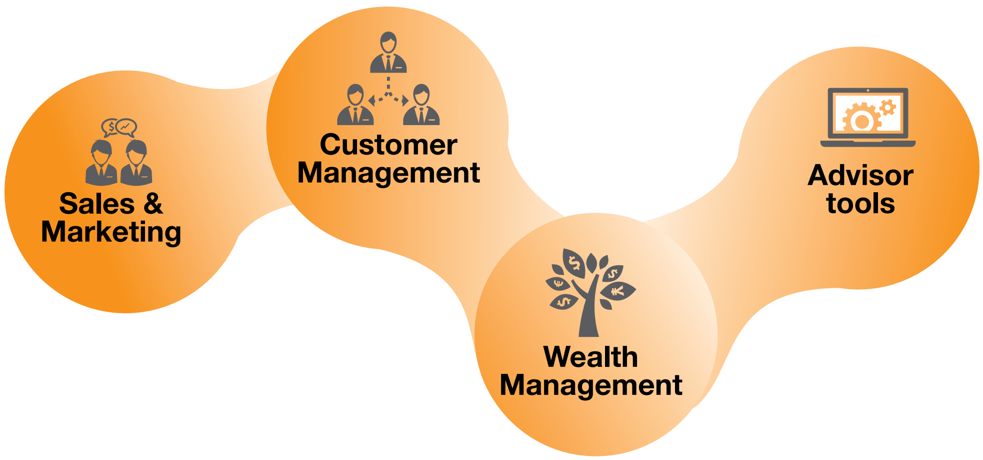


- Helps build stronger, more profitable client relationships: CRM Wealth is designed specifically for financial advisors that simplify client management and advice needs.
- Deliver superior client support: A complete, integrated 360 degree view of your client's and Household Investments with historical data on CRM Wealth gives financial advisors the information they need to quickly spot opportunities, match products, calibrate advise to client needs, and increase customer satisfaction.
- Make better informed decisions using analytical tools: Powerful analytical tools in CRM Wealth helps you identify your most profitable customers, target segments, identify new opportunities for additional sales, and pinpoint areas for operational improvements.

SALES & MARKETING

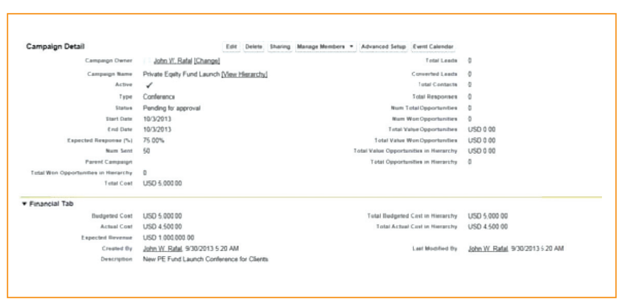
CRM Wealth helps Advisors enhance targeting and tracking of leads and identification of cross selling and targeted marketing opportunities.

Use CRM Wealth to identify right campaign for the targeted audience and evaluate success of your campaign – revenue/ cost benefit analysis.

- Gain business insights using customized flexible dashboards
- Mine data for Cross/up selling products
- Conveniently engage in Prospecting and Opportunity management

Campaign Management:

Marketing team can create campaign and monitor success of campaign. Assign event activities to SME team, add existing lead/client as target audience and send them communication related to campaign.



CUSTOMER MANAGEMENT

Many advisors spend most of their time pulling together information about their clients in a spreadsheet from different systems within their organization. CRM Wealth provides an one stop platform that helps advisors build and track all customer information and provide consistent customer experience across channels.

Customer Life Cycle Management

- Get comprehensive view of the customer – use contact management, capture and study KYC details, perform customer on-boarding and customer profiling for identifying cross-sell/up-sell business opportunities.
- Integrates sales lifecycle, post-sales servicing and customer delight lifecycle to align with the business objective

360 degree view

- Centralized view of Key client information including goals, portfolios, alerts etc., with Mobility enablement helps consistent customer experience across channels thru 360 view

Household views

- Individual & Household portfolio view

360 degree view of client Individual portfolio and consolidated portfolio view of client and his other family members holding investment account with the financial service institute.

WEALTH MANAGEMENT

CRM Wealth provides a rich set of functionalities enabling financial advisors to efficiently plan and manage client's financial objectives. Makes Portfolio Management, Risk profiling, Household views and defining Financial goals convenient for Advisors.

Financial Planning and Risk Profiling

- A flexible framework enables you to meet a wide range of planning scenarios - basic financial and lifestyle goals' assessment to more sophisticated planning requirements.
- Facilitate risk profiling of your clients and provide custom portfolio recommendations based on risk scores.
- Advisors can easily manage financial plans, manage review cycles and monitor with time based alerts and notifications.

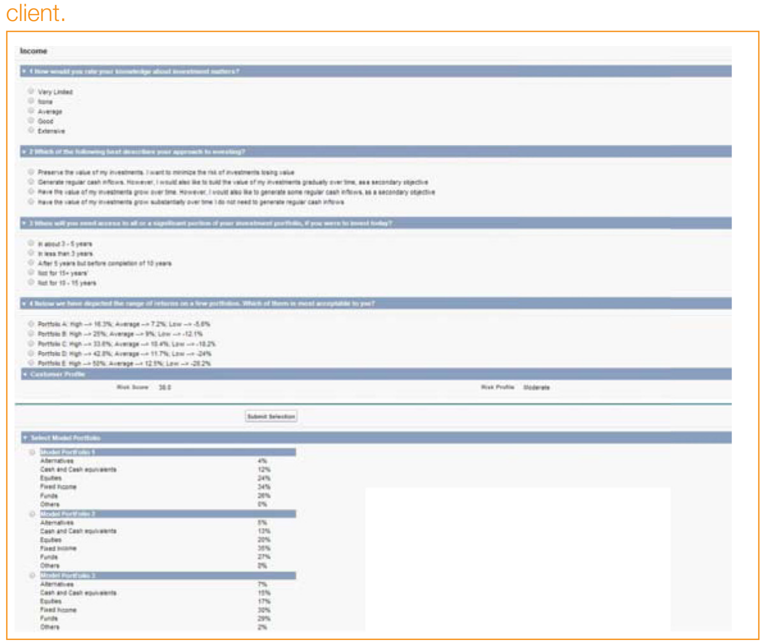
Portfolio and Investment Analysis

Allows you to integrate with portfolio management systems and reporting engines. Display of multiple customer portfolios and also consolidated views across all portfolios for a customer.

Regularly monitor customer portfolio against the allocated model(s) and offer rebalancing suggestions based on set tolerances.

Investment Risk profiling and Financial Profiling:

Helps advisor to know their client's ability to take risk while investing. By using psychometric questionnaires, advisor can assess the risk profile of client.



ADVISOR TOOLS

Analytical tools help Advisors compare plans, evaluate services offered, differentiate and customize service models to the customer. CRM Wealth provides comprehensive dashboard and reports along with facility to use various tools to bring this differentiation and provide unique customer experience.

Business Intelligence and Analytics

- Analytics built at various customer lifecycle stages help the business enterprise to uncover value and insights from the voluminous data accumulated.
- Launch Campaigns quickly enabling smarter decision making process.
- Assists in effective sales through prospect ageing, sales KPI and performance monitoring, work load balancing among advisors, measuring call conversion ratios, assessing customer engagement depth etc.

Advisor Reporting

- Get reports on sales effectiveness, customer service and advice modules alike.
- Generate sleek, visually appealing, graphic supported reports which will empower you with business insights for effective decision making.
- Customize reports by filtering, grouping, and sorting options to enable collecting and displaying the information needed.

Social CRM

- Integrate with various social platforms (Facebook, Twitter, LinkedIn etc.) to get additional touch points.
- Serves as a powerful way to compliment advisory services by enabling true socialization with customers.
- Remains an important means of effective management of marketing campaigns.

Reports & Dashboard

Get insight into key performance measures with reports and dashboards designed especially for advisor & senior management. You can customize reports/ dashboard to meet your business requirement.

Supporting features

- Integrates with Outlook, instant messaging using Communicator with ability to extend to other IM tools.
- Track Campaign Effectiveness - From campaign through Opportunity to Conversion.
- Segmentation of customers based on profile, investment preferences/restrictions, financial details, priorities etc., for creating personalized marketing campaigns.
- Differentiated product offering based on customer profile & need.
- Activities, Follow-ups, Auto & Manual Emails, Assignment, Sharing, Notes, Attachments, etc. facilitated from most processes.
- Configurable Alerts.
- Audit history of opportunities, activities, workflows etc.

For demo or more information about HCL CRM Wealth,
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