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FinEdge™

Wealth CRM Solution

In a rapidly changing and heavily regulated environment, wealth management organizations are under pressure to provide an efficient, seamless and exceptional experience to customers across multiple channels. To successfully and sustainably grow the business, wealth management organizations must increase customer acquisition and retention rates. This requires targeting the right customers with appropriate products, developing a healthy sales pipeline and effective sales process and providing prompt service with a good understanding of customers' needs.

Based on Microsoft Dynamics CRM, FinEdge™ Wealth is a comprehensive CRM solution for the wealth management industry that brings together sales, marketing, customer service and advisory functions in a single solution. This solution is designed to enable wealth management organizations to deliver a superior experience for customers and drive business growth.

FinEdge™ Wealth solution offers Microsoft Dynamics CRM functionality, and also specifically includes the capabilities required by wealth management organizations, such as financial planning, customer relationship management, portfolio management/ analytics, financial calculators and consolidated client reporting.

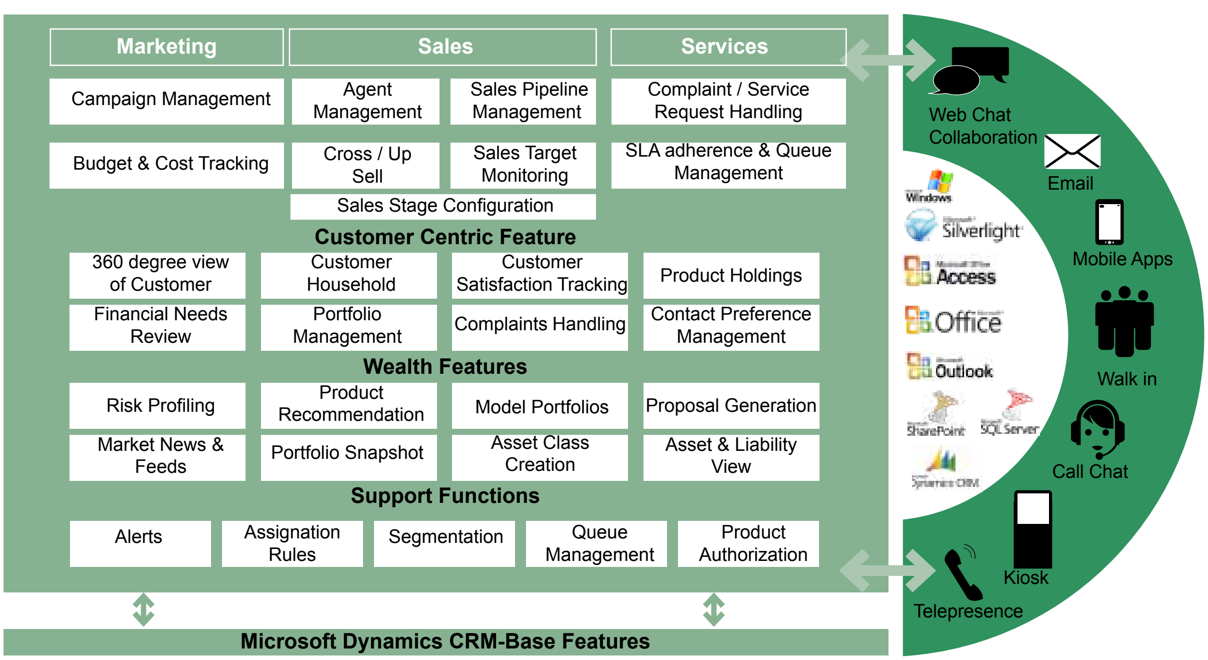
Key Business Drivers

- Risk management and compliance requirements
- Increased mobility
- Changing customer profiles and preferences
- Need for a holistic view of customers and portfolio
- Need for an integrated trade order processing
- Customer satisfaction and experience
- Profitability pressures
- Need to cross-sell, up-sell and right-sell
- Need to enable segmentation and targeted marketing
- Need for structured customer onboarding

FinEdge™ Wealth CRM Solution: Key highlights

- Rapid deployment
- Actionable single customer view
- Risk analysis and product suggestion
- Model portfolio creation
- Portfolio management
- Performance management

FinEdge™ Wealth CRM Solution Architecture



Highly scalable and customizable, FinEdge™ Wealth CRM Solution is a multi-currency, customer-focused platform with fully integrated capabilities suitable for front-line sales teams and financial advisors. Built in social media, business intelligence and analytics and comprehensive campaign management empower staff to respond to customers more accurately and efficiently.

This solution is designed so that wealth management organizations can easily create new entities in the system, set up automated alerts and build workflows that fit with their individual business needs. The framework provides sophisticated searching tools that enable users to instantly access data from large volumes of client or product data.

The solution can be integrated with Microsoft Outlook and provides support for mobile and tablet users to enable wealth managers to work from any location. It also offers offline access to CRM functionality and reporting from synchronized data.

FinEdge™ Wealth CRM Solution : Key features

Financial Planning and Risk Profiling

The main objective of FinEdge™ Wealth CRM Solution is to enable financial advisors to provide product agnostic, highly customized and suitable advice for customers. It provides a flexible framework for a wide range of planning scenarios, supports financial and lifestyle goal assessments both basic and more sophisticated planning requirements, facilitates risk profiling of clients, and provides custom portfolio recommendations based on risk scores. It supports multiple advisory models and enables greater efficiency by enabling advisors to track and manage in-depth financial information on their clients.

Portfolio and Investment Analysis

For effective wealth management, organizations need a consolidated view not just of the customer, but their entire household, with constant monitoring so advice is always up to date. It offers this with the ability to make connections between family members. The solution also provides visibility of in-house custody and third-party holdings, and enables advisors to monitor the customer's portfolio against specific models and make recommendations based on set thresholds.

Customer Lifecycle Management

This solution integrates prospecting, opportunity management, contact management, customer on-boarding and profiling to enable users to build, track and sustain a loyal customer base with a consistent customer experience across multiple channels. The solution's profiling capabilities enhance advisors' ability to cross-sell and up-sell products.

Mobility

To empower users to work from any location, this solution provides access to client data and CRM functionality using smartphones and tablets without compromising security. Data is secured with Microsoft encryption, authentication and authorization technologies that ensure users can only access the data they need, with role-based access policies and encryption for offline data. The solution also supports SQL mirroring, load balancing and multi-tenancy deployments.

Social CRM

Social analytics are increasingly important for wealth management organizations to study customer behavior and support business growth. This solution integrates with social platforms such as Facebook®, Twitter® and Linkedin® to help advisors interact with their customers via more channels. The solution offers a social networking accelerator that monitors social streams and identifies opportunities, which helps organizations can incorporate social media into their marketing campaigns.

Business Intelligence and Analytics

By providing business analytics at every stage of the customer lifecycle,This solution helps the wealth management organizations uncover value and insights from their data, enabling them to make faster and smarter decisions. The solution provides data around prospect ageing, key performance indicators (KPIs), advisor performance, advisor workload, call conversion ratios and the depth of customer engagement. Using this data and predictive analytics, organizations can improve sales processes and accelerate business growth.

Marketing Campaign Management

This solution supports the current paradigm shift from mass-marketing to a 'market-to-one' approach. The solution helps organizations identify suitable campaign targets, based on customer profile, preferences, risk suitability and interest. The solution enables customer segmentation and profiling based on multiple parameters and qualitative data to enable this targeted approach to marketing and more effective cross-selling and up-selling. Following campaign execution, the solution enables users to evaluate campaign success with KPIs and cost-benefit analysis capabilities. With flexible dashboards and data visualization techniques, users can achieve powerful insights into campaign success.

Business Transformation with FinEdge™ Wealth CRM Solution

FROM		TO
Product-focused solution	▶	Customer-focused solution
Secrecy & Asset preservation	▶	Trusted Wealth advisor
Stocks and bonds	▶	Wide-range of alternative products
Transactional Pricing	▶	Annuity pricing
Customer relationships	▶	Customer satisfaction & experience

FinEdge™ Wealth: Benefits

- Accelerated sales cycles
- More effective campaign execution
- Enhanced customer communication
- Streamlined services and feedback handling
- Improved customer satisfaction

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For more information on FinEdge™ Wealth CRM solution, write to us at **hcleas@hcl.com**