

FinEdge™

Banking CRM Solution

Accelerate Business Value
from your
Microsoft Dynamics®
Investments



Helping banks achieve greater growth and deliver better customer experiences

FinEdge™ Banking CRM solution provides robust and flexible features that are intuitive and powerful. As a result, banks can address all customer-facing requirements from a single solution and streamline core sales, marketing, and customer service activities.

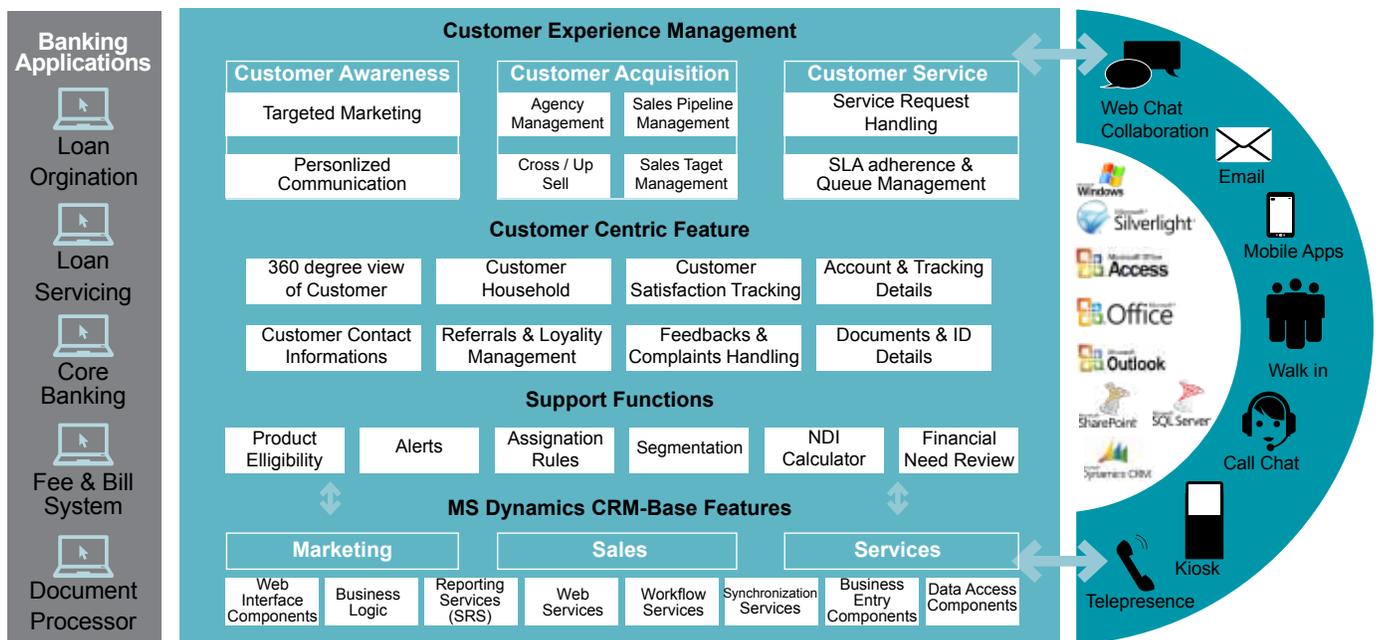
To ensure they target the right customers with the right products, banks need to better understand their customers' needs. And they need IT solutions that can help them achieve this goal and deliver greater competitive advantage.

HCL has drawn on its deep industry expertise and experience of working with more than 100 financial services companies around the globe to build a new breed of customer relationship management solution (CRM) that is specific to the sector and its needs.

HCL's FinEdge™ Banking CRM solution, is based on Microsoft Dynamics CRM, SharePoint and other Microsoft products, is a comprehensive CRM solution that unites sales, marketing, customer service and advisory functions to help banks deliver a superior customer experience and drive stronger business growth.



FinEdge™ Banking CRM Solution Architecture



FinEdge™ Banking CRM Solution: Key features and functionalities

This solution provides robust and flexible features that are intuitive and powerful. As a result, banks can address all customer-facing requirements from a single solution and streamline core sales, marketing, and customer service activities.

FinEdge™ Banking CRM solution supports the following nine tenets of effective Customer Experience Management:

Comprehensive customer view: It unlocks the data from core banking systems and other data silos to give a unified 360° view of every customer, including products, risk profiles, profitability and lifetime value.

Customer need analysis: Banks can match customer profiles and needs to product specifications to ensure 'right selling'. As a result, offers and programs can be tailored and targeted more easily and effectively.

Multi-channel sales management: It provides complete integration and management of sales leads from all channels, robust contact management and detailed pipeline tracking. It also offers integration with Microsoft Outlook and other Microsoft collaboration technologies, such as Lync and Yammer. Alerts can be assigned to ensure sales opportunities are progressed in a timely manner - from initial meetings through to completion. Individual sales opportunities can be classified by branch, region, state, or even at a national level to provide better visibility of the sales pipeline and make reporting more relevant. All of these features help banks close more business faster.

Campaign management and tracking: With this solution, banks can build, manage and measure product-based campaigns, special offers and promotions. Advanced customer segmentation and analytics support the cross-selling and up-selling of products based on customer profiles and product usage characteristics. Email and telesales campaigns can be easily created by individual users while cross-channel marketing campaigns and responses can be quickly measured.

Customer satisfaction management: This solution provides enhanced customer service capabilities that simplify SLA management and increase customer satisfaction. By integrating customer information and workflows, banks can handle customer service requests more efficiently and resolve issues first time.

Customer feedback management: The management information provided by this solution enables banks to assess whether customer complaints are being handled as per regulators' guidelines, which will minimize the risk of financial penalties and drive better customer satisfaction.

Customer loyalty management: Customers' participation in different loyalty programs can be centrally tracked. This makes it easier to reward referrals and promote customer advocacy.

FinEdge™ Banking CRM Solution Benefits

- Actionable single customer view
- Need-based offerings with real-time inputs
- Accelerated sales cycle
- Enhanced revenue management productivity
- Better campaign execution
- Effective and personalized communication
- Streamlined service requests / feedback handling
- Increased customer satisfaction
- Stronger performance management
- Rapid deployment

Robust analytics and reporting: With all customer, sales, and marketing data residing in a central place, reporting is smarter and faster. This solution provides the analytics to unlock the full of business value of large volumes of data. As a result, banks will gain a better understanding of their customers and be able to predict their 'next logical purchase'. The solution also helps banks evaluate which campaigns and sales/ marketing activities provide the highest return on investment.

Social media integration: This solution can be easily integrated with common social platforms to provide banks with additional customer engagement channels. Its social networking accelerator monitors social streams to provide an insight into current conversations, which can help drive future growth.



Case Studies

Major South East Asian bank

The customer was looking for a common regional CRM platform to rationalize and standardize its processes across multiple locations. This standardized approach would support consistent sales and service processes, which, in turn, would simplify ongoing management and measurement. Using the FinEdge™ Banking CRM solution and HCL's global Microsoft Dynamics CRM Rollout methodology, the client was able to deploy the application in a rapid timeframe without compromising on quality. More than 4,000 employees use the solution across five countries to manage tasks, leads, customer relationships and service delivery.

Leading European bank

With the UK and Ireland tightening their regulations around product mis-selling and service quality, banks need to ensure they are not exposed to reputational or financial risks, which can run to millions of pounds. To comply with its regulatory obligations for handling customer complaints, the bank needed to deploy a dedicated complaints management system. By deploying the FinEdge™ Banking CRM solution, the bank has streamlined its complaints handling process in line with the regulators' guidelines. It will also be able to accelerate similar process improvements across its branch network.



Hello, I'm from HCL! We work behind the scenes, helping our customers to shift paradigms and start revolutions. We use digital engineering to build superhuman capabilities. We make sure that the rate of progress far exceeds the price. And right now, 90,000 of us bright sparks are busy developing solutions for 500 customers in 31 countries across the world. **How can I help you?**

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

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