



Specialized Banking CRM

Data Powered Insights

Efficient Decision Making

Personalized Customer Service

Core Banking System is like a heart that powers the entire banks and other financial institutions. CRM is like a brain, it processes information and enables interaction with clients.

CX360 is a specialized banking **CRM** that acts as an all-in-one platform for employees in various sectors that deal with client data. Originally a Loan Tracking System, **CX360** evolved to serve the needs of collection, marketing, sales, business development and other sectors that interact with clients.

CX360 is a modular solution - your financial institution can create your own CRM.

CX360 modules:

Loan Tracking System

KYC/AML Task Manager

Sales Opportunities

Client On-Boarding

Complaint Manager

Product Catalog



Why do financial institutions choose CX360?

	 CX360 ✓	Similar Solutions ✗
Use case	Custom made for banks & financial institutions	Modified for banks
Technical deployment	On-premise & cloud	Cloud only
Pricing structure	Transparent	Complex
Customer support	Agile support guaranteed by SLA*	Little to no support
Role administration	Defined by the bank	Limited customization
Interface	Intuitive	Intuitive
On-boarding	Demo & personalized trainings	Demo
Integration with other apps	Yes	Yes
Additional support	Consulting on efficient business processes	Not defined

CX360 modules have been implemented in these banks:

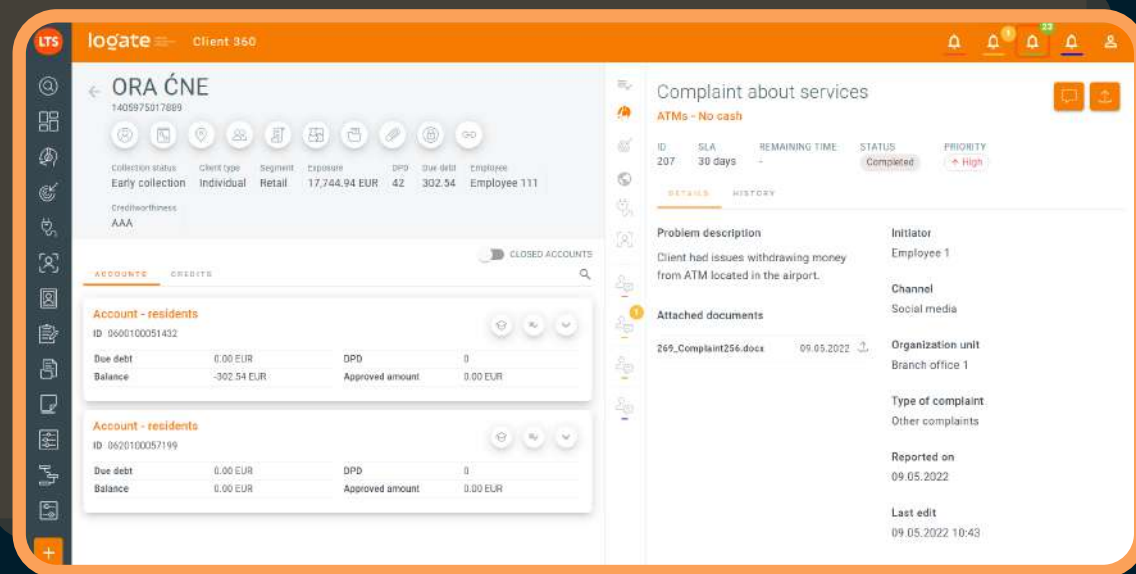


360°View is a pre-requirement for any CX360 module.

Integration with Core Banking System is possible in 2 ways:

real-time (through online web services)

1-day delay (automated .CSV load).



360°View shows essential client data, personal data, contacts and portfolio details.

Employee and supervisor can see to do list for the specific client, as well as communication history between past/currently assigned employees and the client, making it easier to gather intel and reassign client to another employee.

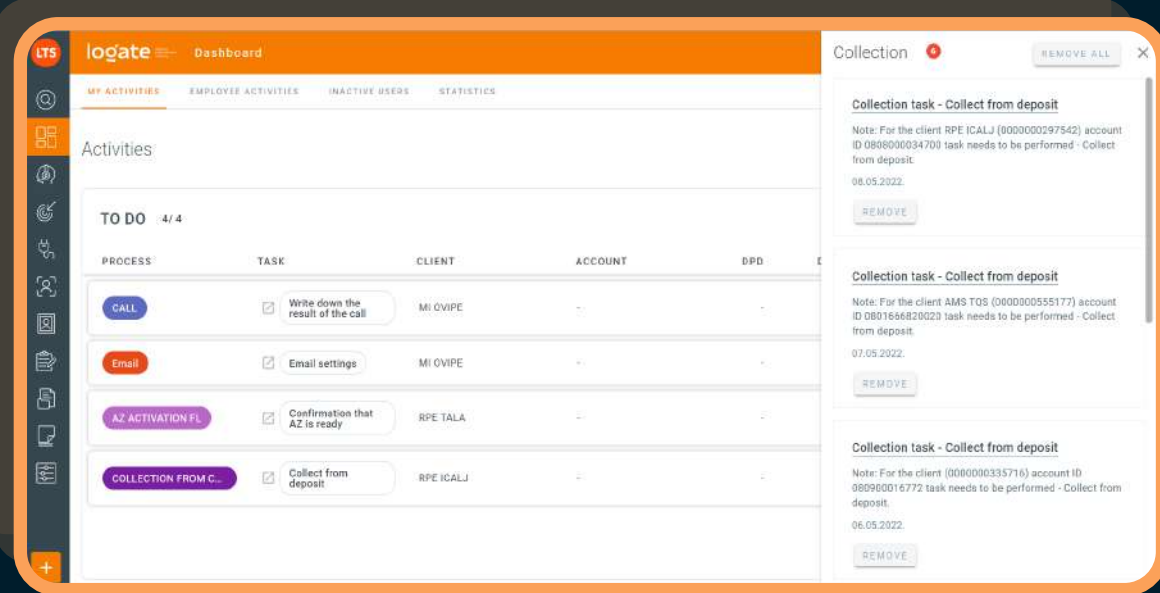
Financial institutions can also create custom processes that are in line with their goals and business practices.



Loan Tracking System

Loan Tracking System is module for debt collection, covering all aspects of early and late collection processes.

Instead of using several systems to communicate with the client, **Loan Tracking System** integrates with contact center and messaging solutions to automate communication regarding debt collection.



Banks and other financial institutions can define email or note templates with dynamic attributes for higher efficiency.

Late collection processes can also be automated by connecting **LTS** to the bank's legal department (internal or external) for final late collection stages.

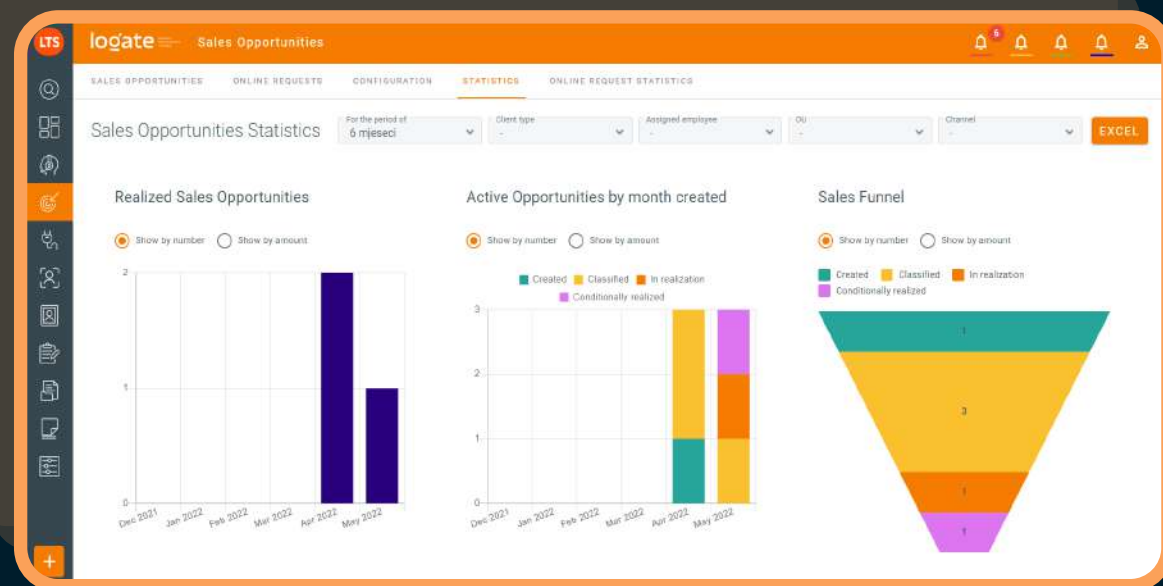
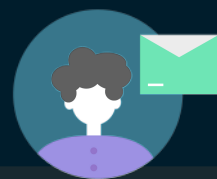
Results of **LTS** implementation:

- ✓ Significantly increased number of sent out messages
- ✓ Significantly increased number of calls
- ✓ Increased overall efficiency of the collection department
- ✓ Better customer experience
- ✓ Reduced NPL ratio in the overall loan portfolio

Sales Opportunities

Sales Opportunities module is made for modern approach in sales processes that heavily relies on personalization.

It is designed to empower your team with detailed information for proactive approach in contacting leads or existing clients.



Your employees can manage leads and existing clients in Canban or list view.

Status of each sale can be controlled by the assigned employee until the final phase.

Once the employee marks sale as realized, it automatically gets "conditionally realized" triggering **CX360** to communicate with the core in order to verify the status.

Once the core confirms, the sale is finally marked as realized and the information is attributed to the assigned employee.

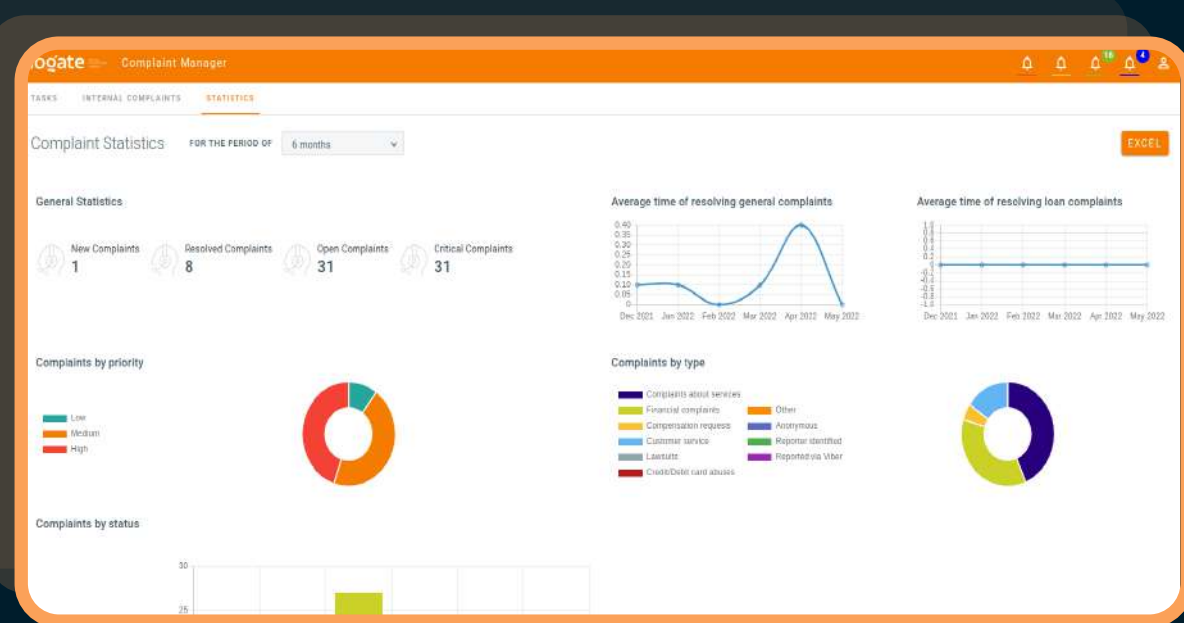
Supervisors can track progress of employees, identify top performers and coach those struggling to close sales.

Complaint Manager

One study shows that **68%** of customers become annoyed when their call is transferred to another department.

Complaint Manager module ensures each complaint your institution receives is passed on to the right employee.

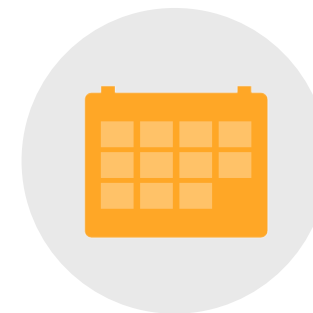
Cross-sector collaboration is also possible on issues that require employees from several sectors to work together in order to provide the solution.



Complaint Manager has omni-channel integration enabled in order to gather complaints from social media, dedicated email address, messaging platforms, etc.

Advanced statistics show received complaints by type, priority and status, as well as average time of resolving general and loan complaints.

With Complaint Manager, you can efficiently manage complaints and greet frustrated clients with amazing support.



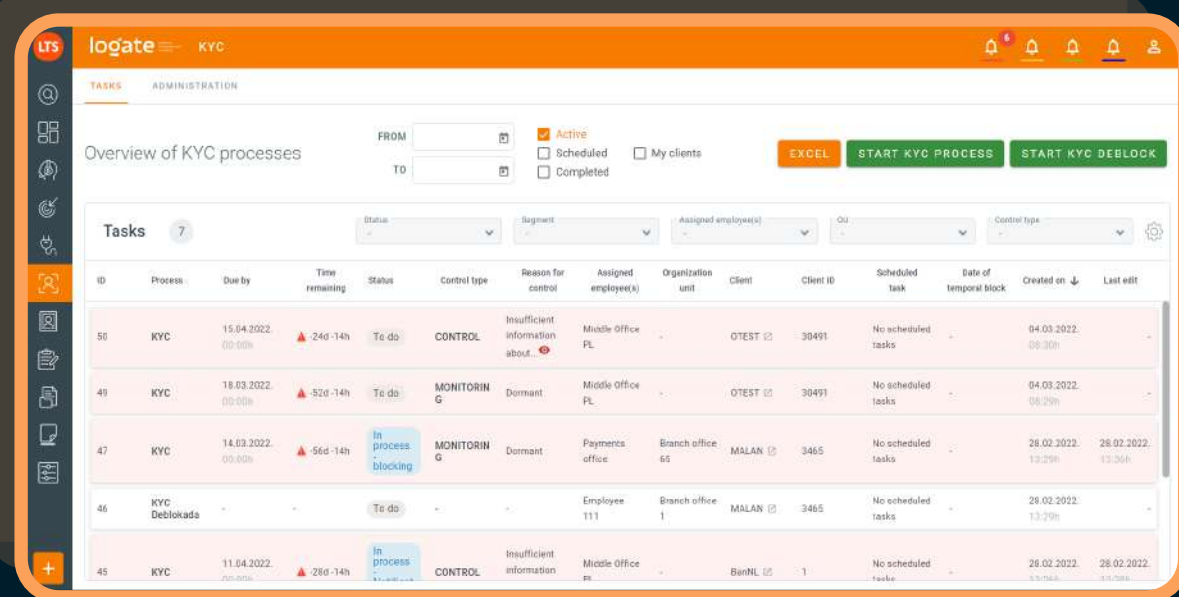
We can show you how Complaint Manager works in less than 30 mins.
Book a demo call and change your complaint management for better.

KYC/AML Task Manager

How well do you know your clients?

With **KYC/AML Task Manager**, your financial institution will always have the most up to date client documents.

Whether it is ID or any other piece of information relevant to you, **KYC/AML Task Manager** can create automated tasks for employees or group of employees to follow up and check in with the client.



Based on your preset parameters, the system can detect any irregular activity and notify employees, urging them to ask for information from the clients, protecting your bank from suspicious or illegal undertakings.

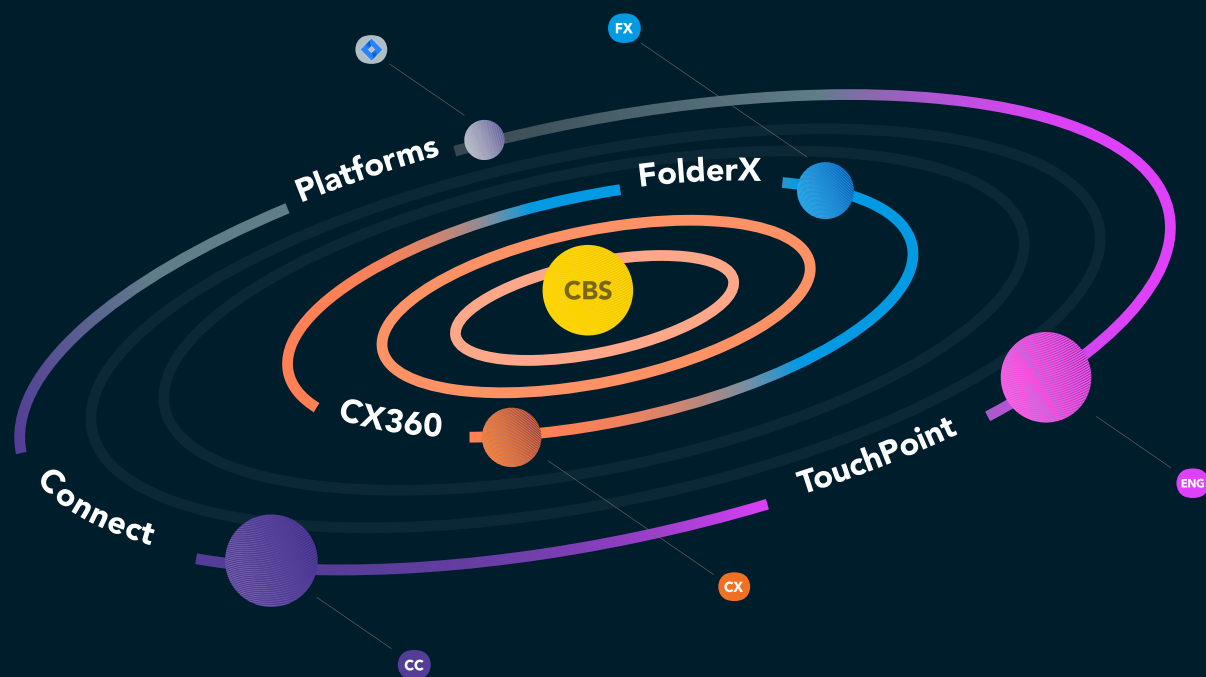
KYC/AML Task Manager can also be used for tailoring banking services and products to client's needs in a changing environment.

With preset parameters and assessment scale, Early Warning System can pick up on drop in account turnover and alert the employees.

The employees can offer refinancing or any other product or service that relates to the current situation the client is in.



See how KYC/AML Task Manager can improve your business. Book a demo call today



Digital Banking Universe is a set of tools built around the Core Banking System:

- ✓ **Connect** - Advanced Contact Center
- ✓ **TouchPoint** - Powerful Mass Messaging System
- ✓ **FolderX** - Secure Document Management System
- ✓ **Open MX** - Enterprise E-mail System

Ready to become fully digital? Schedule a demo to see Client On-boarding in action..

Client On-boarding

Client On-boarding module provides the entire set of tools needed for account registration, even remotely.

This module can be integrate with e-signature certificates and video calls for maximum security.

CX360 can easily integrate with our Connect contact center solution but it is also vendor agnostic and can work in symbiosis with any other contact center software.

Product Catalog

Product catalog lists all of your products in one place. With this module you can create set of procedures and automated approval rules for any business process.

And that there's the entire Universe of possibilities to help you transform your business....

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