

Case study:



NLB Banka Podgorica & Sales Opportunities

CX360 Sales Opportunities Module As a Systematized Way of Managing Leads in NLB Podgorica

NLB Podgorica, member of the Slovenian NLB group, was looking for a solution that would enable their Sales department to track all of their sales processes, interactions with clients and schedule actions and reminders such as calling the client, scheduling appointments and more. Furthermore, their Sales team leaders needed to be able to follow leads through the sales funnel and have an overview of the team's performance and identify top sellers.

CX360 Sales Opportunities module streamlines the entire lead lifecycle management for the Sales team.

Key benefits:

- ✓ Sourcing leads from multiple online channels into a single interface
- ✓ Increased promptness and efficiency of employees
- ✓ Increased motivation and employee experience

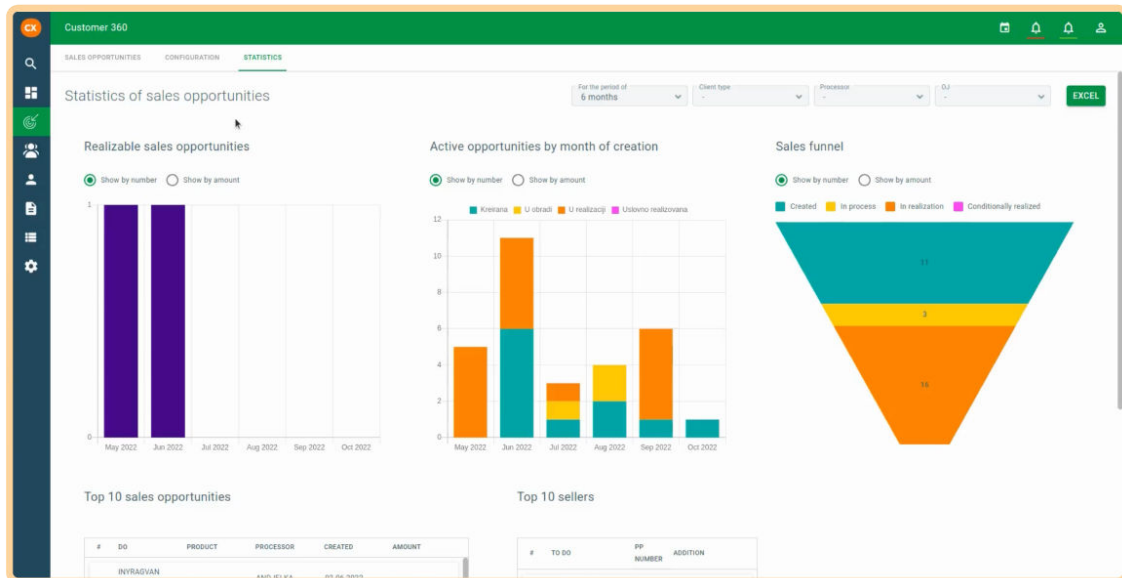
"We are able to track leads through each funnel stage in a simple and efficient way. Having an overview of employees' performances, we are able to evaluate efficiency, promptness and motivation.

The Sales Opportunities module changed the bank's culture and habits of the Sales team for the better."

Mile Grbin

Director of Product Development
and Digital Channels Sector
NLB Banka Podgorica





Sales Teams at NLB Banka Podgorica Start and End Their Work Day With CX360

“Before NLB Bank implemented CX360 Sales Opportunities, sales processes had not been standardized. Every employee had their own way of tracking their leads, using Excel, email and other methods. Since there was no system in place, it was impossible to track leads through funnel stages in a uniform way.”

The Logate team, being made of seasoned Sales professionals, was able to quickly identify pain points that existed at NLB Bank. Since NLB group acquired Komercijalna banka in Montenegro as well in one of the biggest acquisitions in Montenegrin banking industry, their client base increased significantly. Not only did they have to track progress on the leads but also to support their growing Sales team in closing sales successfully.

CX360 Sales Opportunities module is a centralized platform for Sales Team leaders to check in on their team members and, in a matter of seconds, generate reports on how many leads there are in each funnel stage. Supervisors can see statistics on regional, branch or individual level. In order to verify each sale, CX360 communicates with your core banking system or data warehouse before moving the lead to the last funnel stage and assigning the sale to the employee.

“CX360 has reduced the time it takes to convert leads to customers which significantly saves our resources. Nowadays, the work day of our employees starts and ends with Sales Opportunities. Not only are some common tasks automated but the CRM helps the bank grow with functions such as bulk import and omni-channel integrations with online forms and social media channels.”

Mile Grbin, Director of Product Development and Digital Channels Sector
NLB Banka Podgorica

CX360 Sales Opportunities Module Was Integrated With Multiple Systems

The Sales Opportunities module was implemented for retail and corporate banking departments at NLB Banka Podgorica. By integrating CX360 with the existing forms on the bank's website and their Viber chatbot, through which the bank is generating leads, we managed to connect all of its online channels for capturing leads into the "Online requests" tab of CX360 Sales module. Sales team can manage those leads through one platform.

In order to make the process of loan approvals easier for the bank, we integrated CX360 in real time with the bank scoring system.

"Logate is not a vendor but a true partner. Instead of maintaining old systems, Logate is an innovator that constantly introduces helpful upgrades and updates."

Mile Grbin, Director of Product Development and Digital Channels Sector
NLB Banka Podgorica

Contact

Evropska 2, Dahna
Poslovni centar Knjaz
81000 Podgorica

Tel: +382 67 485 161

Email: jevrosima.zogovic@logate.com

www.logate.com