CORE BANK PROCESSING

CSI CRM

CSI

Dynamic Solutions. Superior Results.

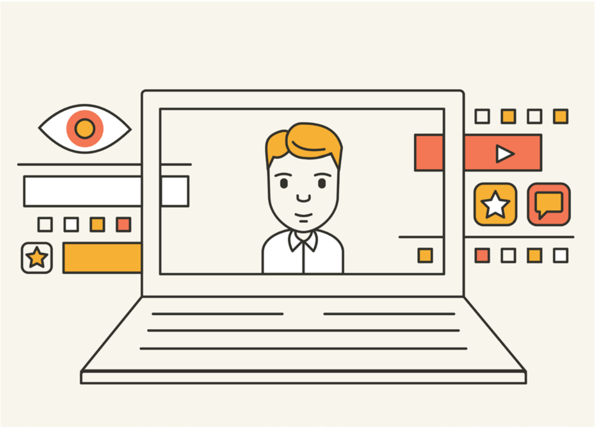
WITH CSI CRM, YOUR BANK GAINS A CLEAR VIEW INTO YOUR CUSTOMERS' JOURNEY ACROSS CHANNELS AND A BETTER WAY TO DELIVER AN EXCEPTIONAL CUSTOMER EXPERIENCE

Outperform the competition by elevating your customers' experience. Fully embedded into our NuPoint® core processing solution, CSI CRM provides a customer engagement tool to help you track, capture and manage interactions with current and future customers.

CSI CRM offers the following benefits to your bank:

- Embedded within NuPoint core
- An enhanced view of your customers' and prospects' journey across channels
- An intuitive layout in the newest tiles format

Staying ahead of the competition and delivering an extraordinary customer experience is easy with CSI CRM. We designed it with banks like yours in mind to help you meet growing customer demands.



CUSTOMER CONTACT MANAGEMENT

Customer Contact Management provides your bank with the following key benefits to help you deliver an exceptional customer experience:

- Record relevant interactions with customers, prospects and affiliates within the CRM
- Create notes, reminders and appointments in your calendar to nurture relationships and anticipate your customers' needs
- Initiate emails within the system using a stored email address from your customers' profiles
- View the preferred channels and behaviors of your customers to understand how best to contact and stay in touch with them
- Build and maintain your sales pipeline with accurate and plentiful customer and prospect information

RELATIONSHIP MANAGEMENT

Relationship Management offers three contact categories to make your job easy: customers, prospects and affiliates.

- Create customers, prospects and affiliates within the system
- Convert a prospect to a customer without rekeying any information
- Link and group customers, prospects and affiliates with one another to create an informed view of their relationship with other bank customers
- Capture valuable relational data on customers, prospects and affiliates — such as their social media links and interests — to build relationships and drive marketing and cross-sale efforts.

CASE MANAGEMENT & WORKFLOW

The Case Management & Workflow module enables you to easily:

- Record and track customer and prospect inquiries or resolve complaints
- Assign multi-step processes in adherence with bank policy
- Set up and receive real-time notifications

CAMPAIGN MANAGEMENT

Campaign Management provides the ability to manage a marketing campaign or batch communication, from beginning to end, with just a few easy steps:

- Create target lists using CSI IQ or third-party partners
- Choose a method for delivery (on-screen, email, print mail and calling)
- Monitor campaign results and report on effectiveness

With this module, you also gain access to email templates and stock photos for campaign design. Bank staff can choose on-screen delivery of campaign promotions while completing a customer search where the customer is determined to already be a part of a targeted campaign list.

SALES & REFERRAL TRACKING

The Sales & Referral Tracking module allows your banker to easily capitalize on marketing efforts and revenue-generating activities.

- Create opportunities and referrals for both prospects and existing customers
- Direct opportunities and referrals to the appropriate individual staff member or group with notifications
- Track and manage activities and interactions through the sales pipeline
- View snapshots of sales pipeline to make informed decisions

With this newly gained level of efficiency, the proper individual banker or group can quickly and easily respond to a referral or open an opportunity, leading to an increased probability of revenue generation, customer stickiness and wallet share.

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