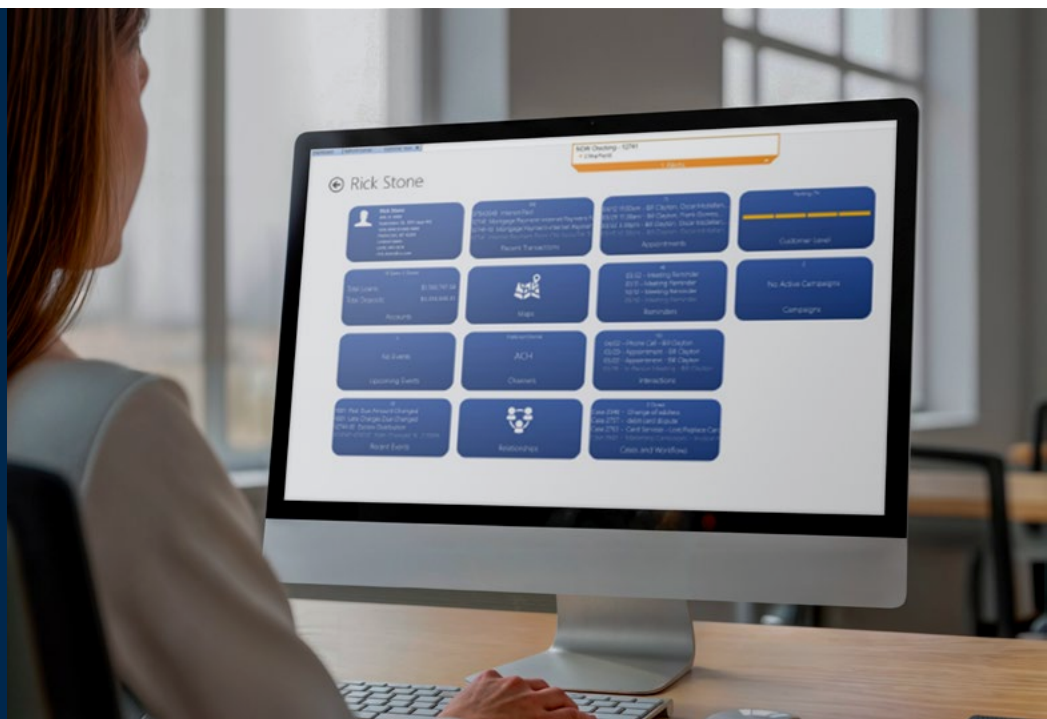


Elevate Every Customer Interaction

Customer expectations are higher than ever. Your institution needs tools that make it simple to capture, track and act on every interaction across every channel.

CSI CRM, fully embedded within the NuPoint® core, empowers your team to strengthen relationships, streamline operations and uncover opportunities, all from one unified platform.



Embedded Relationship Management

CSI CRM is a relationship management solution designed for community banks. From contact tracking to campaign execution, it brings together the tools your team needs to deliver a consistent, personalized experience without leaving NuPoint.

Customer Contact Management



Capture every interaction and anticipate customer needs.

- Log interactions with customers, prospects and affiliates directly in the CRM
- Add notes, reminders and calendar appointments to stay proactive
- Send emails within the system using stored addresses from customer profiles
- View channel preferences and behaviors to tailor outreach
- Build and maintain a more accurate sales pipeline with reliable data

Relationship Management



Understand your community by connecting relationships.

- Create and manage customers, prospects and affiliates in one place
- Convert a prospect to a customer without rekeying information
- Link and group related records for a complete relationship view
- Capture relational insights—such as interests or social media links—to personalize engagement and drive cross-sell efforts

Case Management & Workflow



Resolve issues quickly and consistently.

- Record and track inquiries or complaints for full visibility
- Assign multi-step processes in line with bank policy
- Set up and receive real-time notifications to speed resolution
- Streamline operations without requiring retraining or workflow changes

Campaign Management



Launch targeted campaigns and measure results.

- Create target lists using CSI IQ or third-party partner data
- Deliver campaigns through email, print, phone or on-screen prompts
- Monitor results in real time to evaluate effectiveness
- Access ready-to-use templates for quick campaign design
- Display promotions on-screen when staff interact with targeted customers

Sales & Referral Tracking



Turn opportunities into long-term relationships.

- Create and manage referrals and opportunities for both prospects and existing customers
- Automatically route opportunities to the right banker or team with notifications
- Track pipeline progress with snapshots and reports
- Ensure quick, efficient follow-up to increase revenue and deepen loyalty

Every Interaction Matters



CSI CRM helps your institution:

- Strengthen customer engagement across every channel
- Improve efficiency and accountability for your team
- Grow loyalty, wallet share and long-term relationships

See how CSI CRM empowers your institution to turn interactions into lasting relationships. Request a demo today and discover how easy it is to deliver the experiences your customers expect.