NexJ CRM for Commercial Banking

NexJ Customer Relationship Management (CRM) for Commercial Banking has intelligence built-in, and integrates client profile, interaction, and transaction information into a comprehensive customer view. On top of delivering superior performance and usability, our CRM for Commercial Banking product was built to address the integration challenges, inflating costs, and limited functionality faced by other CRM options currently on the market. By offering a CRM product that supplies the real-time data required by firms, we deliver a superior user experience, drive high user adoption rates, and provide a competitive total cost of ownership.

Deliver Superior Service

- Present all information about a client in a single comprehensive view including all client interactions at a company, individual and account level
- Better understand and proactively respond to client needs to deepen relationships and drive loyalty
- Drive relevant, proactive touches that are personalized to the client

Grow Revenue and Share of Wallet

- Gain insight into each client's business and relationships
- Improve collaboration and promote team-based selling to increase cross-sell opportunities and fee-based revenue
- Drive the identification, routing, execution and management of cross-sell opportunities

Increase Banker and Team Productivity

- Streamline key processes and automate best practices including client onboarding, account reviews and referrals
- Seamlessly integrate banking tools, including portfolio management, loan origination and market news with comprehensive client information
- Allow teams to exchange secure messages, in-context of a client activity, to improve customer service.

Key Benefits

Increase share of wallet

by leveraging a complete view of the client across regions and product lines to identify opportunities as well as upselling and cross-selling possibilities

Gain a complete understanding

of client profitability and risk by aggregating accounts, holdings, and risk along company or ad-hoc hierarchies

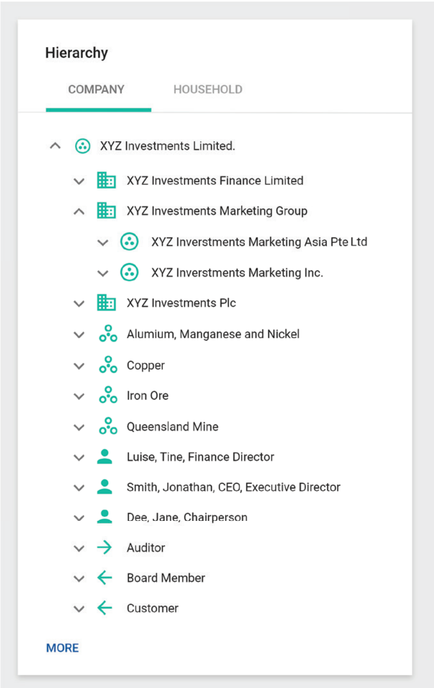
Increase collaboration

between bankers and specialists across regions and product lines by improving information sharing and communication capabilities

Become a trusted partner

through deeper client insights and providing superior client service

NexJ CRM for Commercial Banking is an Intelligent Customer Management (ICM) product that provides best-of-breed CRM functionality tailored for Commercial Banking.



Client Relationship Modeling

Comprehensive Customer View

Designed to help consolidate all key information from data sources across your firm, our Comprehensive Customer View equips your bankers with the most informative, insightful and up-to-date information.

Deal & Pipeline Management

View current sales performance and generate detailed sales reports to visually track and manage performance against sales targets

Coverage Team Management

Define a team of users (such as product specialists) responsible for selling and servicing a company or client to ensure efficient and effective customer service.

Call Reporting with Coverage Team Distribution

Automatically distribute call reports across coverage teams and create followup activities.

Client Relationship Modeling

Built to help model client-centric relationships across corporations and spheres of influence, to understand client organizations and drive cross-selling and high-quality referrals.

Client & Team Calendar

Provide a single view of client-specific activities across the firm, ensuring all team members have a holistic view of interactions.

NexJ Insights

An add-on module designed to provide bankers with opportunities for interactions to promote retention and advocacy, Insights is a built-in digital engagement service. It pulls relevant digital content from more than 10,000 third party publishers and filters it prior to distribution to ensure it complies with financial services regulations.

Client Onboarding

An add-on module that streamlines and automates client-facing processes like client onboarding with dynamically branching SmartForms that streamline data collection, generate all necessary forms, trigger crossfunctional workflows, and prompt for action to increase the speed, accuracy, and consistency of client-centric processes.

Microsoft Outlook Integration

An add-on module that automatically synchronizes tasks, contacts, and calendar items between Microsoft Outlook and NexJ CRM and Exchange-enabled mobile devices. Access detailed contact information directly from Outlook so bankers always have the information they need to communicate effectively with their clients and prospects.

NexJ Nudge™

An add-on module developed to provide bankers with data-driven recommendations to help increase their customer's assets under management, NexJ Nudge™ functionality can help bankers deliver the best service and improve client outcomes – in real time. This feature generates and ranks actions, which are then presented to the banker to help them to carry them out.

To learn more, visit **www.nexj.com** or email **info@nexj.com**

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About NexJ Systems

NexJ Systems is the pioneer of Intelligent Customer Management. Our award-winning CRM is designed to help Wealth Management, Private Banking, Corporate and Commercial Banking, and Insurance firms revolutionize their business. Powered by artificial intelligence, our products help drive productivity, boost client engagement, and increase revenue. With users in over 60 countries, our customers benefit from our deep expertise across financial services verticals, strategic investment in innovation, and commitment to their success.