NexJ CRM for Sales, Trading, & Research

NexJ Customer Relationship Management (CRM) for Sales, Trading, & Research 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 Sales, Trading, & Research 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.

Provide relevant recommendations

- Consolidate all information about a client into a single view to improve insight
- Build lists and calls to action from research subscriptions, holdings, interests, and market data
- Identify patterns across clients to uncover trends or new trade ideas

Ensure appropriate and timely interactions

- Monitor for events and prompt users with recommended calls to action
- Push information to prompt users using actionable notifications
- Segment contacts and manage interactions according to defined service levels
- Receive real-time news and tickers in the context of client interests and holdings

Collaborate to provide superior client service

- Enhance team-based selling and service by including the expertise of internal specialists
- Understand relationships and spheres of influence with graphical relationship modeling
- Coordinate interactions and client service with a client-centric calendar and secure chat

Increase productivity and share of wallet

- Prioritize important clients and activities in the role-based home page
- Easily log calls, create tasks, and notify stakeholders automatically to facilitate trades

Key Benefits

Guide timely calls to action

for sales people, traders, and research analysts using AI, business rules, client context, and external market events

Provide superior client service

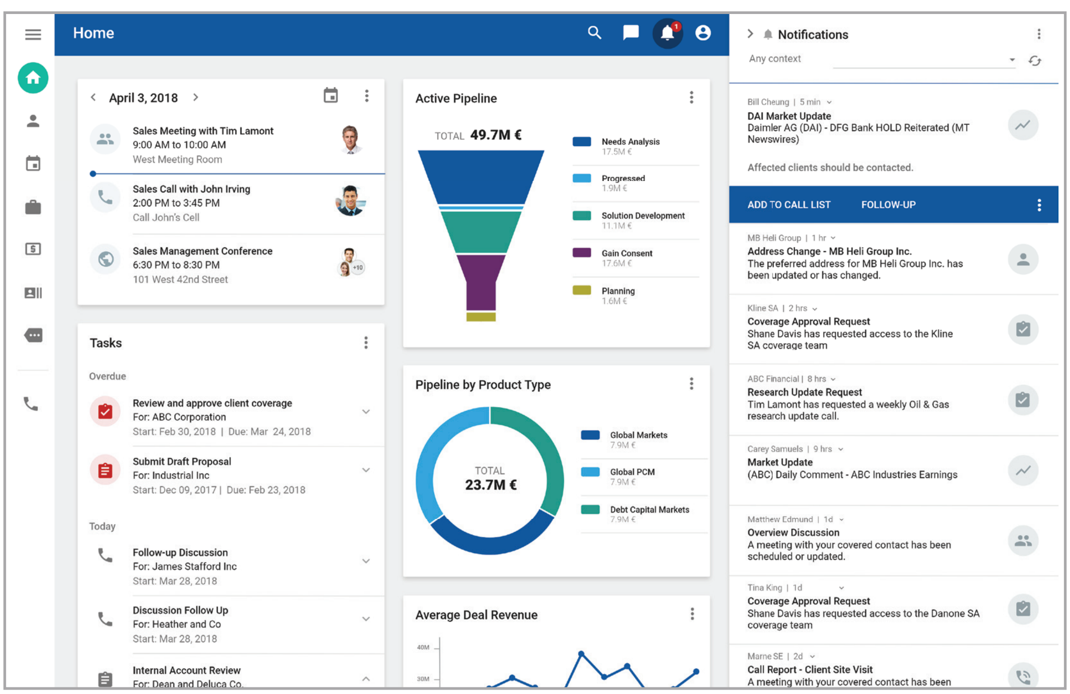
by enabling effective collaboration between sales, trading, and research

Provide better client insight

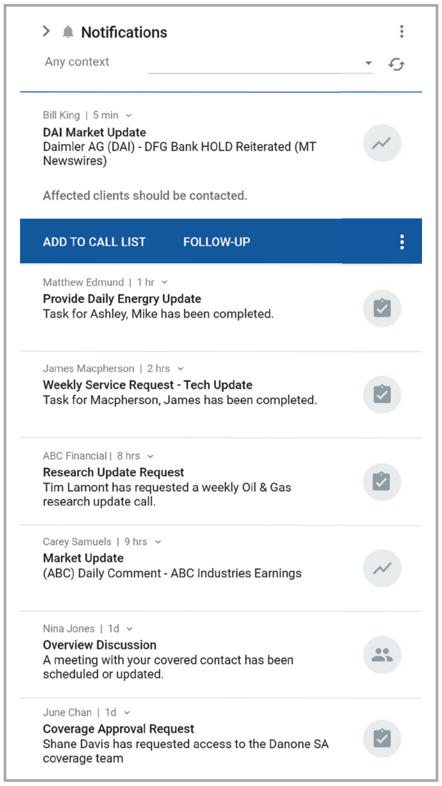
by leveraging a comprehensive view of all client information

Monetize interactions

by making it easy to log calls and automatically notify stakeholders to facilitate trades



NexJ CRM for Sales, Trading, & Research is an Intelligent Customer Management (ICM) product that provides best-of-breed CRM functionality tailored for Sales, Trading, & Research.



Actionable Notifications

Roadshow & Event Management

Seamlessly support the entire event and roadshow lifecycle from planning to booking through to execution for complex, multi-city events. Users can efficiently generate a list of invites, manage the distribution of support materials, and measure participant feedback.

Comprehensive Customer View

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

Actionable Notifications

Deliver targeted information to users based on a contact's interests, holdings, and subscriptions to prompt for immediate action.

Call Lists & Call Logging

Call lists can be generated using filters such as geography or stock interest, or automatically using configurable business rules such as frequency of interaction by client tier. Configurable scoring and prioritization rules prompt users to work on the most critical calls first. Users can quickly capture notes and call reports. A copy is automatically logged in the Contact Journal and distributed to the coverage team and other designated users.

Role-Based, Industry-Specific Home Page & Dashboards

Users can see a prioritized summary view of notifications, client activities, revenue, and tasks in a role-based home page that delivers information to the user, including real-time news feeds and recommended actions. Graphical dashboards enable users to view key information and take action immediately.

Research Subscriptions & Stock Interests

Maintain the research subscription and stock interest preferences of clients by region, sector, industry and security. Users can leverage research subscription and stock interest data to drive list building, call lists and calls to action.

Client Relationship Modeling

Capture an unlimited number of spheres of influence and/or parent-child and arbitrary relationships for a contact, such as those between a portfolio manager, analyst, and trader. Users can aggregate information such as call reports, interactions, and other interactions up to any level of the hierarchy.

NexJ Insights

An add-on module designed to provide users 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.

NexJ Nudge™

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