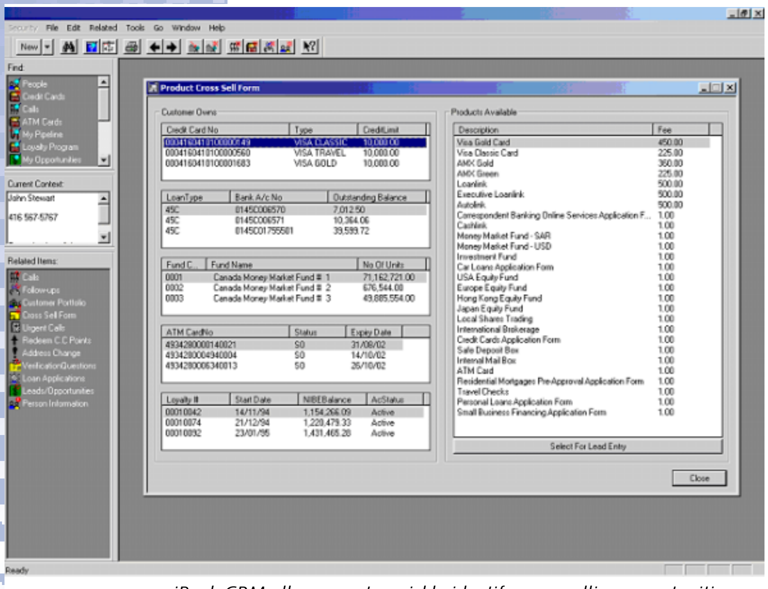
iBank CRM

Bank on Customer Relationships with iBank CRM powered by Clientele

Powered by Clientele

In today's competitive market, acquiring, retaining and growing customer relationships are among the greatest challenges faced by the financial services industry. iBank CRM from Epicor Software Corporation partner Inforica is a complete, cost-effective enterprise-wide customer relationship management (CRM) solution, designed specifically for the banking industry to help cultivate long-term profitable customer relationships.



iBank CRM allows you to quickly identify cross-selling opportunities.

Leveraging the technology of Epicor's award-winning Clientele CRM suite, iBank CRM unites information and processes from the sales, marketing and support functions of a financial services organization. iBank CRM is designed for responsive institutions looking to stand out in the crowded financial services market. This solution is designed to work under all business structures-whether your institution is a commercial bank, retail bank or investment bank. iBank CRM powered by Clientele empowers you to exceed your clients' service expectations, resulting in greater levels of loyalty and retention. It also enables you to capitalize on potential sales opportunities, leading to asset growth and higher profitability.

Deliver First-Class Customer Service

iBank CRM powered by Clientele allows your firm to easily gather, organize and share customer information, making possible a real-time, two-way flow of communication between your bank and your customers. This application is a complete tool for managing- even anticipating- the support needs of your clients, thereby enabling you to provide them with service that exceeds their expectations. Responding to your client's needs in a timely, meaningful manner can make the difference between retaining a customer and losing them to your competitor.

The support-centered functionality of iBank CRM empowers you to:

- Provide personal bankers, branch managers and any customer support staff with a complete view of customer product holdings and transaction history on checking and saving accounts, investments, mortgages, credit lines and credit cards.
- Alert bank staff on customer rating and importance.
- Facilitate service representatives to act as salespeople by identifying cross-sell opportunities across business lines.
- Create instant calls and escalations for urgent issues such as lost or stolen credit cards or account irregularities.
- Maintain a complete record of customers' call history to ensure seamless service at each client interaction across business lines and distribution channels.
- Provide fast and accurate answers to frequently asked questions such as credit application process and reporting stolen cards.
- Generate comprehensive reporting on call volumes, problem types, by agent, geography, or business lines.

Epicor Solution Provider

Inforica

iBank CRM

Empower Your Sales Team

Establishing long-term, profitable relationships with your clients is critical to surviving in today's fiercely competitive marketplace. iBank CRM allows everyone in your bank, from the tellers to the branch managers, to create and maintain strong relationships with their clients. Sales representatives need to be provided with current information, such as your bank's rate comparison to competitors, investment vehicles preferred by different investors, immediate answers about portfolio status, historical rates of return, and market overviews. Additionally, iBank CRM enables sales representatives to proactively manage their sales territories and the entire life cycle of their opportunities. iBank CRM empowers your sales team to:

- Deepen client understanding by collecting soft client data, otherwise unavailable in core banking systems.
- Leverage customer profiles to increase cross sell levels to existing customers
- Close sales from leads generated by other departments such as customer support.
- Analyze sales by account manager, sales representative, product, territory, branch and department.
- Review and analyze sales pipelines and revenue forecasts.
- Have updated competitive information regarding new products and services through a built in competition file.
- Track customer interests, literature requests and support calls.
- Know the products and services important to specific customer segments.
- Live, onscreen reporting of sales KPI at RM, branch and regional levels.
- Maintain a central repository of updated competitive information.

Are Your Marketing Campaigns Making a Direct Deposit to the Bottom Line?

Targeting investors with the right programs and messages and retaining them can be your most powerful competitive weapon. iBank CRM enables you to measure the success of marketing campaigns, understand your target market and improve communications.

This solution allows your company to effectively manage its marketing programs and eliminate waste by providing the following information:

- Identify what advertising and promotional programs generated the most sales versus costs.
- Customize marketing programs for specific target segments through a mix and match of different criteria through the list management feature to develop lists for telephony, mail or e-mail campaigns.
- Compare marketing effectiveness across branches and territories to determine best practices and identify growth opportunities.
- Track requests and dispatches for literature and information

Manage Customer-Centric Workflow Across the Enterprise

With fierce competition in the banking industry, it becomes even more critical to value all customer relationships. However, the challenge is that usually more than one person is required to effectively complete a task or generate information pertaining to various operational queries. How do you ensure that your customers receive timely and accurate answers to their questions? iBank Workflow can help achieve this-it is like having an unattended user who performs regularly scheduled tasks or escalates issues when they are not resolved in a timely manner. The marketing capabilities in iBank CRM empower you to:

- Create alerts for RMs if account balances drop significantly or if there is a default on a loan payment.
- Facilitate online credit approval processes.
- Develop timed milestones and action plans based on specific workflows.
- Manage workloads by using calendar-based rule sets.
- Assign calls to others within a certain sales or operations team.
- Escalate calls and issues if they remain unresolved by operations group.

System Components and Requirements

- Clientele by Epicor 7.3
- Inforica Clientele/iBank module

- Provide RMs with an easy interface for client data cleansing

Analytics That Count

"Today's smartest financial services companies analyze a wealth of data to understand, plan and run their businesses more effectively. More than ever, access to compelling customer information is critical for success. iBank CRM provides your company with a powerful way to slice and dice data on customer demographics, customer product holdings, competitor rates and transaction histories. iBank CRM's analytic capabilities allow you to:

- Navigate easily with rich, online inquiry-just choose the information you are looking for and ask questions.
- Leverage soft data collected via the iBank sales module for richer analysis
- Conduct enterprise-wide planning and forecasting, OLAP analysis and reporting
- Access both OLTP (online transactional processing) and OLAP (online analytical processing) through unique OLAPlink technology.
- Share search results among users for greater productivity throughout the organization, and save search definitions to create personal libraries.
- "Slice and dice" data for sophisticated analysis and obtain visual snap-shots for quick graphical representation of data.

For More Information

To learn more about how iBank CRM powered by Clientele can help your company meet sales goals and enhance customer interactions, contact The Clientele Group of Epicor Software Corporation at 800-356- 0912 in the U.S. and Canada or 949-612-2600 internationally.

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