PIVOTAL® CRM FOR COMMERCIAL BANKING

Build Stronger, More Profitable Client Relationships with Powerful CRM Software Designed Specifically for Commercial Banking

Commercial banks face increasing competition from new players, including global banks and alternative sources of funds. In response, they need to work harder to ensure that their clients feel valued and receive high-quality service that promotes client loyalty. Pivotal CRM for Commercial Banking provides the foundation and tools commercial banks need to implement processes that maximize opportunities and to craft a client experience that differentiates them from competitors.

Pivotal CRM for Commercial Banking gives banks features to improve productivity and expand client value.

- **Increase corporate knowledge** by sharing all client information

- **Accelerate the sales cycle** by automating time-consuming steps

- **Leverage relationships more effectively** with insight into client connections and influence

- **Improve collaboration** with automated workflows for managing account setup and other complex processes

- **Increase new client referrals** and referrals of existing clients between lines of business

- **Improve cross-selling and up-selling** with in-context links to complementary products

Pivotal CRM for Commercial Banking is a complete, end-to-end client relationship management (CRM) tool that offers exceptional functionality tailored to the needs of commercial banks. Pivotal CRM for Commercial Banking was designed to help commercial banks retain the advantages and insight of traditional relationship banking while capitalizing on the efficiencies of automation and centralized client information and opportunity management.

At the individual employee level, Pivotal CRM equips users with the information they need to deliver exceptional, personalized service while cross-selling and up-selling effectively. Relationship officers can track client companies' business plans within the system, including their strategic direction and priorities, enabling them to proactively provide personalized services that fit the client's business needs. At the executive level, Pivotal CRM enables management to track and manage the revenue pipeline, identify business at risk, and gain insight into trends and opportunities. Pivotal CRM for Commercial Banking also enables firms to capture client referrals reliably and follow up on them consistently, including referrals from one line of business, such as depository services, to another, such as credit card servicing.

Pivotal CRM for Commercial Banking provides all of the standard features commonly needed by commercial banking organizations and reflects a data model devised specifically for the industry, leading to a faster, lower-cost implementation. Built on the highly flexible Microsoft® .NET Framework–based Pivotal CRM platform, it is designed to be quickly and

cost-effectively customized to meet individual firms' unique needs and easily integrated with third-party systems and data sources. In fact, it comes pre-integrated with Microsoft Office, Outlook,® and SharePoint®—the tools your employees use every day.
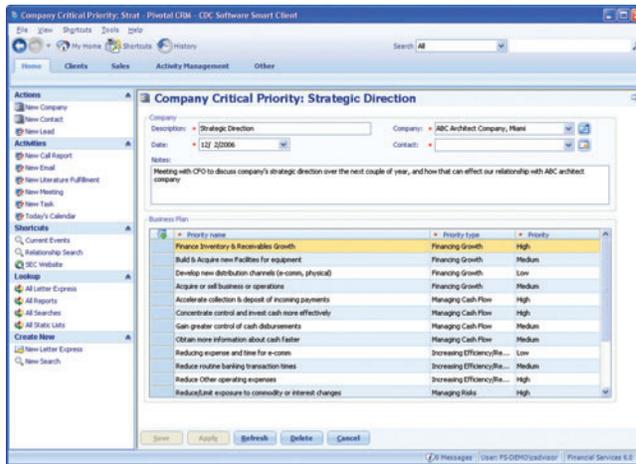
Track client business plans to deliver proactive service

INCREASE PRODUCTIVITY AND IMPROVE COLLABORATION WITH A HOLISTIC CLIENT VIEW

Pivotal CRM for Commercial Banking creates a comprehensive repository of client information—including opportunities, transactions, contacts, interests, business plans, preferences, influencers, and more—becoming your firm's most valuable information hub. With tools that help manage and leverage relationships, plan and execute communications, and act on opportunities, Pivotal CRM increases productivity and improves collaboration across sales, marketing, and client service functions.

MANAGE CLIENT RELATIONSHIPS PROACTIVELY

Build your client relationships strategically by planning out an entire year of client communication and contact. Pivotal CRM for Commercial Banking enables users to map out client relationship touch-points to ensure regular, coordinated interaction. Furthermore, using Pivotal CRM to track and understand market, competitor, client, and sales trends encourages more proactive account management, as well as more informed decision-making.

Personalized Dashboard

Provides a fully customizable personal "dashboard" that drives productivity and gives users immediate access to critical client information, third-party data feeds, and more.

Company Profiles

Displays information such as industry, size, net worth, share of wallet, return on equity, profitability, assets, liabilities, and total value, as well as rich business information such as branches and subsidiaries, business goals and priorities, events, and business stage, giving a complete view of the client company.

Contact Profiles

Provides full profile information at the individual contact level, such as role, relationship to other contacts, level of influence, and past interactions with the bank, mapping the relationships and roles of contacts within client companies.

Relationship and Influence Tracking

Offers at-a-glance graphical overview of client company relationships, influences, and influencers, including influence over other clients or prospective clients, enabling users to easily assess true client value and strategically grow client company portfolios.

Business Plan Tracking

Allows bank to track client business plans and note strategic direction and priorities, enabling relationship officers to deliver personalized, proactive, and timely services, products, and advice tailored to the client company's strategic initiatives and business model.

Referral Capture and Management
Captures all client referrals in the system and helps transform them into new business. Enables users to generate referrals for existing clients to other lines of business within the organization, increasing up-selling and cross-selling.

Activity Management
Tracks and manages all activities at both the individual and the company level. Tight Outlook integration allows users to easily manage their calendar, contacts, task lists, and more without leaving the CRM system.

Reporting
Provides robust reporting abilities, including key reports such as customer profiles, opportunity forecasts, and activity summaries.

Call Planning and Call Reporting
Enables relationship officers to plan annual call strategies to foster consistent, coordinated, and timely client communication and relationship development. Easily captures call details, products and services discussed, and results for a complete history of interactions and accurate executive reporting.

Territory and Team Assignments
Allows flexible assignment of client coverage teams according to geographic and/or product-based parameters and pairs these teams with client action plans.

Lead Management
Permits configuration of custom questions on lead-entry forms for better lead qualification and follow-up. Enables users to assign leads to different lines of business or specific employees.

Competitive Information
Links each product to competitive product information, enabling wealth managers to offer more competitive rates and features.

Cross-Selling Assistance
Indicates possible cross-sell products related to each opportunity, enabling advisors to increase deal size and offer clients the best options.

News and Ticker Information
Displays real-time news and ticker information for investment products on product forms, facilitating on-the-spot evaluation and company information.

Data-Driven Workflows
Promotes greater efficiency, consistency, and collaboration with the ability to implement product-based workflows for account setup, underwriting, and other complex multi-step processes.

Power Search
Allows rapid search for clients or prospects who own, are interested in, or have discussed a certain product, supporting easy distribution of related research or news items to targeted lists.

Microsoft® Outlook® Integration
Synchronizes all e-mails, contacts, and activities are between Pivotal CRM and Microsoft Outlook, making it easy to maintain up-to-date information and increasing work efficiency. Outlook behaves as though embedded within Pivotal CRM for a seamless user experience.

Lotus® Notes® E-mail Synchronization
Synchronizes all e-mails between Pivotal CRM and Lotus Notes, maintaining consistency.

Mobile and Wireless Availability
Offers easy, secure access to client information while on the road, allowing for uninterrupted delivery of outstanding client service.

Materials and Literature Fulfillment
Tracks and manages distribution of marketing collateral, office supplies, gifts, and other materials.

Privacy Compliance
Empowers users to easily provide clients with privacy statements detailing mandatory and optional third-party disclosures in adherence with privacy laws regulated by Gramm-Leach-Bliley or PIPEDA.

Disclosure Tracking
Tracks both mandatory product-based and global disclosures, as well as client opt-outs of optional information-sharing with third parties where applicable.

User-Friendly Interface

Familiar Microsoft-style user interface with role-based navigation makes Pivotal CRM a comfortable application for users to work with, reducing the learning curve and improving productivity.

More than 9,000 customers around the world rely on us to give them a competitive edge. By providing innovative, industry-driven enterprise application software, Aptean helps businesses to satisfy their customers, operate most efficiently, and stay at the forefront of their industry.

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