

CRpm von UNIQUARE und vwd group

Customer Related portfolio manager

- **Managing existing customer relations**
Actual situation, goals and risk attitude of the customers are stored in appropriate analysis sheets and are available for structured analysis. When desired a summary of the led discussions can be generated.
- **Gaining new potential**
New potential is determined by targeted segmentation of customers and prospects. New sales opportunities are filtered promptly, wastages are reduced. The high-quality potential results in a higher conclusion ratio and in an increased customer value.
- **Event-triggered generation of activities**
The rule-based generation of activities to maturities and events enables an efficient and targeted customer addressing and makes the associated rationalization of administrative activities possible. For example when the definition of an asset allocation is injured, when a pre-defined performance is reached, during overdraft of liquidation accounts, when a certain amount limit (absolute or proportional) is reached, when a speculation period is expired or at purchase or sales signals of a certain security.

UNIQUARE Software Development

UNIQUARE is the leading supplier of customer related frontend solutions and is specialized in process integrated total solutions for all customer-oriented workflows in the banking sector since 1988. The state of the art standard software suite UNIQUARE Business-Management enables individual customisable SW components for straight-through business processes in a multi channel environment. Solutions are in use in over 400 banks for over 100.000 users.

vwd group

vwd group is the largest German system and solution provider for intelligently prepared financial market data. Workflow oriented products and services of vwd group link data of the relevant financial market information stream with high-quality functionalities. For over 50 years they help banks, traders, investment consultants and customers to make founded decisions and to secure and expands assets: excellence in financial solutions

Overview to CRpm

- Straight-through process-connection of Customer Relationship Management and Portfolio Management
- Innovative advisor cockpit for sales, consultation and administration of private customers estate
- Synergy solution of 2 specialists for financial services industry: UNIQUARE and vwd group
- Demanded by customers and trusted in practice operation

about vwd portfolio manager

- portfolio management
- security analysis
- individual reporting
- asset allocation
- deposit administration

about UNIQUARE Business-Management

- prospects/customer administration
- sales planning and controlling
- sales opportunities management
- event and campaign management
- activities management and scheduling
- product information system
- consultative support
- statistics and report
- process management and support

Capability characteristics

- Holistic view on customers
- tracking of sales opportunities over all sales phases
- task and schedule driven monitoring of sales process
- absence and deputy management
- unalterably notification system, based on audit trail conventions
- history of data changes (customer data, appointments, tasks etc..)
- rule-based generation of appointments and activities out from the current control of the securities portfolios

CRpm: more value than just the sum of its parts

- easy-to-understand and straight-through working processes
- automation of routine working processes
- improvement of the service quality
- higher conclusion ratios due to targeted addressing of customers and cross selling hints
- creation of higher customer value

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