UNiQUARE Business-Management
Private Banking

The best customer service possible

Private banking is all about trust. In order to ensure sustainable customer relationships based on trust, it is vital that both the achievement of long term customer goals and the professional management of relationships are given the highest priority. Comprehensive information about the customer is the key. Professional support in collecting, processing and evaluating information is essential to enable the best advice possible, optimal service and knowledge of the customer's needs.

Technology can also support the management of the always-increasing customer demands and variety of products today. This allows the Client Relation Manager to spend more time on his essential work of providing an exclusive customer service.

UBM *Private Banking*

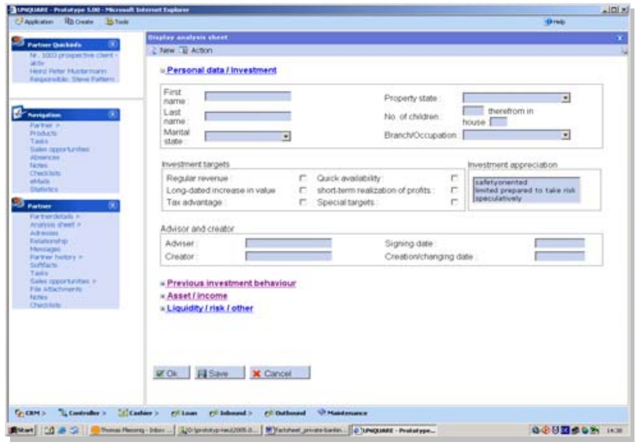
Managing existing relationships: UBM *Private Banking* acts as the central information hub managing the top end customer relationships. Information concerning the current situation, goals and willingness of the customer to accept risk is gathered and stored in the system, ready to be analyzed. Upon request the system creates a summary containing all discussions with the customer up to now.

Developing new potentials: UBM *Private Banking* enables a structured management of the relationships with customers and business partners. The selective segmentation of customers and prospects clearly identifies both existing sales opportunities and new potentials. Genuine sales opportunities recognized at an early stage in order avoid losses due to non-selective advertising. The high quality potential leads to a higher closure rate and better customer value.

Supporting advisory: In the context of a comprehensive individual product catalogue, information about different investment and financial security products can be created and cross- and up-selling product suggestions can be inserted. Interfaces to the portfolio management and financial planning systems ensure a professional analysis and evaluation of the customer data. This enhances the decision quality.

Supporting administrative issues: UBM *Private Banking* also contains classic CRM functionalities such as planning, implementing and directing marketing and sales campaigns or task and appointment management.

Considering legal requirements: The complete and audit-proven data history conforms to the increasingly strict legal requirements. 'Know your customer" questionnaires and effective money laundering controls allow a relationship with the customers based on trust.



UBM *Suite*

UBM *Private Banking* is part of the UBM *Suite*, which offers sales support components as well as standard components for advisory services, processing of loans and for the transaction related business. Integrated process and multi-channel management components enable the effective management of the entire value adding process in banking across all relevant distribution channels.

UBM *Private Banking* as well as the UBM *Suite* are available both in advanced Web technology and in client/server technology. Both versions are multi-platform capable, provide multilingualism and are freely scalable.

Our solution has received many accolades from independent institutions and our customers have won a number of awards (Schwetz, Aberdeen Group, Best Practice CRM Award, first place according to the CRM study of the University of St. Gallen).

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Benefits

Improved Customer Service:

- Competent product information and advice
- Personalized multi-channel service
- Higher process transparency (continuous status information available)
- More time for customers thanks to automation of routine tasks

Increased Revenue:

- Higher closure rate from targeted sales approach
- Increased added value for customers
- Centralized management of sales activities
- Process optimization (automated, standardized processes) and integration
- Minimization of error sources and prevention of redundant data input
- Best use of the specific advantages of different distribution channels

Important Features

- Automated conversion of prospects into customers
- Tracking of sales opportunities across all sales phases
- Task and timeframe monitoring of sales processes
- Integrated management of absences and deputizing arrangements
- Creation of notes and memos
- Modification-proof notification system
- Bi-directional synchronization of appointments, tasks, message synchronization
- Creation of change histories (master data, appointments, tasks, etc.)
- Cross-selling and up selling

Interfaces to:

- Portfolio management system
- Financial planning system
- Processing/fulfillment system
- Transaction system (including to proprietary inventory systems)
- Contact center (compatible with all popular CTI providers)
- etc.

Components and Functions

Prospect / Customer Administration

Input and modification of master data
Visualization of relationship networks
Visualization of total customer commitment
Monitoring of money laundering transactions
Classification and segmentation of prospects and customers
Links to products, sales opportunities, appointments, activities, news
Addition of specific customer data

Sales Planning and Management

Definition and management of organizational units
Planning and monitoring of target/actual values
Delegation of responsibilities
Statistical analysis

Sales Opportunities Management

Generation, delegation and monitoring of sales opportunities
Statistical analysis

Event Management

Selection of target groups
Organization and management of events
Automated response handling

Activities and Appointment Planning

Management of appointments for individuals, groups and organizational units
Double-booking check

Product Information System

Input and modification of product data
Optimized presentation of product information for each recipient (staff member and customer) and distribution channel
Listing of alternative or additional products

Advisory Service Support

Input of wishes and goals
Input of personal and financial parameters
Rule based product suggestions

Process Support

Form management
Checklists

Further Information

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