

UNIQUARE Business-Management CRM, Marketing & Acquisition

Professional sales management and enhanced customer service

The intense pressures of cost and competition within the banking sector, combined with the ever increasing customer expectations in terms of advisory and other services require systems which are more marketing oriented and enable a qualified and efficient response to market demands. In an increasingly saturated market, the focus shifts to maintaining existing customer relationships. It is essential that these customers benefit from the best advice and service possible and that their needs are clearly identified and satisfied. The key is to have as much information about the customer as possible. In addition, new and yet unsaturated markets are opening up. Here, the emphasis is on streamlining the sales process and on the target group oriented communicating of the product portfolio via suitable distribution channels.

At the same time high processing costs have to be reduced and efficient sales structures should be created. Administrative workflows require increased automation and standardization, as well as the development of customer oriented advisory and service processes. UBM *Marketing and Acquisition* supports you in meeting all these challenges.

UNIQUARE Business-Management

UNIQUARE Business-Management (UBM) directs and manages all processes and ensures optimal use of the different distribution channels at the point of customer contact, from marketing, acquisition, advisory services, processing of loans to transaction handling. UBM *Marketing and Acquisition* is the component that covers the entire marketing and acquisition area.

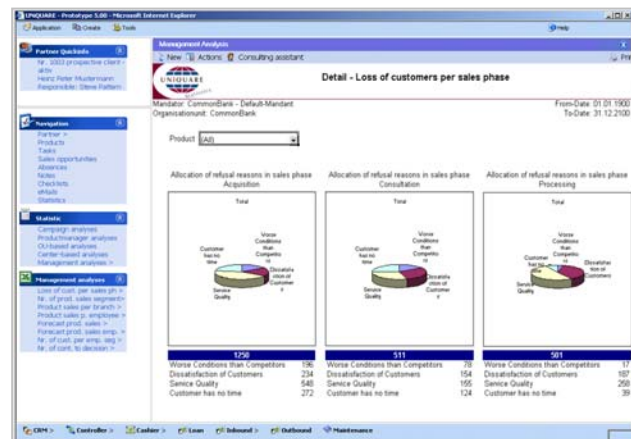
UBM CRM, Marketing and Acquisition

Professional management of sales activities: UBM *CRM, Marketing and Acquisition* enables a clear mapping of the sales structure, definition of sales objectives and comparison of target versus actual, planning and implementation of management measures across the whole sales organization considering the relevant distribution channels.

Effective management of existing relationships: UBM *CRM, Marketing and Acquisition* is THE central hub managing all customer relationships. Information such as the target situation, the customer's goals and willingness to accept risk is gathered and recorded in the system. This information builds the basis for analysis and evaluation. A comprehensive authorization concept ensures that each user can only access the information to which he is entitled.

Developing new potentials: The targeted segmentation of customers and prospects clearly identifies both existing sales opportunities and new potentials. Genuine sales opportunities are recognized at an early stage in order to avoid losses due to non-selective advertising. The high quality of the potentials leads to a higher closure rate and better customer value.

Effective advisory support: Within the context of a comprehensive individual product catalogue, information about different products can be created and links to cross- and up-selling products can be established. Interfaces to portfolio management and financial planning systems ensure that customer data is professionally analyzed and evaluated, which enhances the quality of the decisions made.



Automation of administrative tasks: UBM *CRM, Marketing and Acquisition* also contains classic CRM functionalities like planning, implementation and directing marketing and sales campaigns or task and appointment management.

UBM Suite

UBM *CRM, Marketing and Acquisition* is part of the UBM *Suite*, which offers sales support components as well as standard components for advisory services, processing of loans and transaction related business. The integrated process and multi-channel management components enable the effective management of the entire value adding process in banking across all relevant distribution channels. This solution effectively supports business processes in the corporate and retail business of all bank groups and organizational forms.

The UBM *Suite* as complete package is available both in advanced Web technology and in client/server technology. Both versions are multi-platform capable, provide multilingualism and are fully scalable.

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

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Benefits

Increased Revenue:

- Higher closure rate from selective 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

Improved Customer Service:

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

Important Features

- Automated conversion of sales prospects into customers
- Tracking of sales opportunities across all sales phases
- Task and timeframe monitoring of sales processes
- Integrated management of absences and substitutes
- 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- and up-selling

Interfaces to:

- Advisory service system
- Processing/fulfillment system
- Transaction system (including to proprietary inventory systems)
- Contact Center (compatible with all popular CTI providers)

Functions

Prospect / Customer Administration

Input and modification of master data
 Visualization of relationship networks
 Visualization of total customer exposure
 Classification and segmentation of prospects and customers
 Links to products, sales opportunities, appointments, activities, news
 Add-on information 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

Campaign Planning and Execution

Selection of target groups
 Organization and direction of campaign phases
 Automated response handling

Planning of Activities and Appointments

Management of tasks and appointments for individuals, groups and organizational units
 Check of double-bookings

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

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

Process Support

Form management
 Checklists

Further Information

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