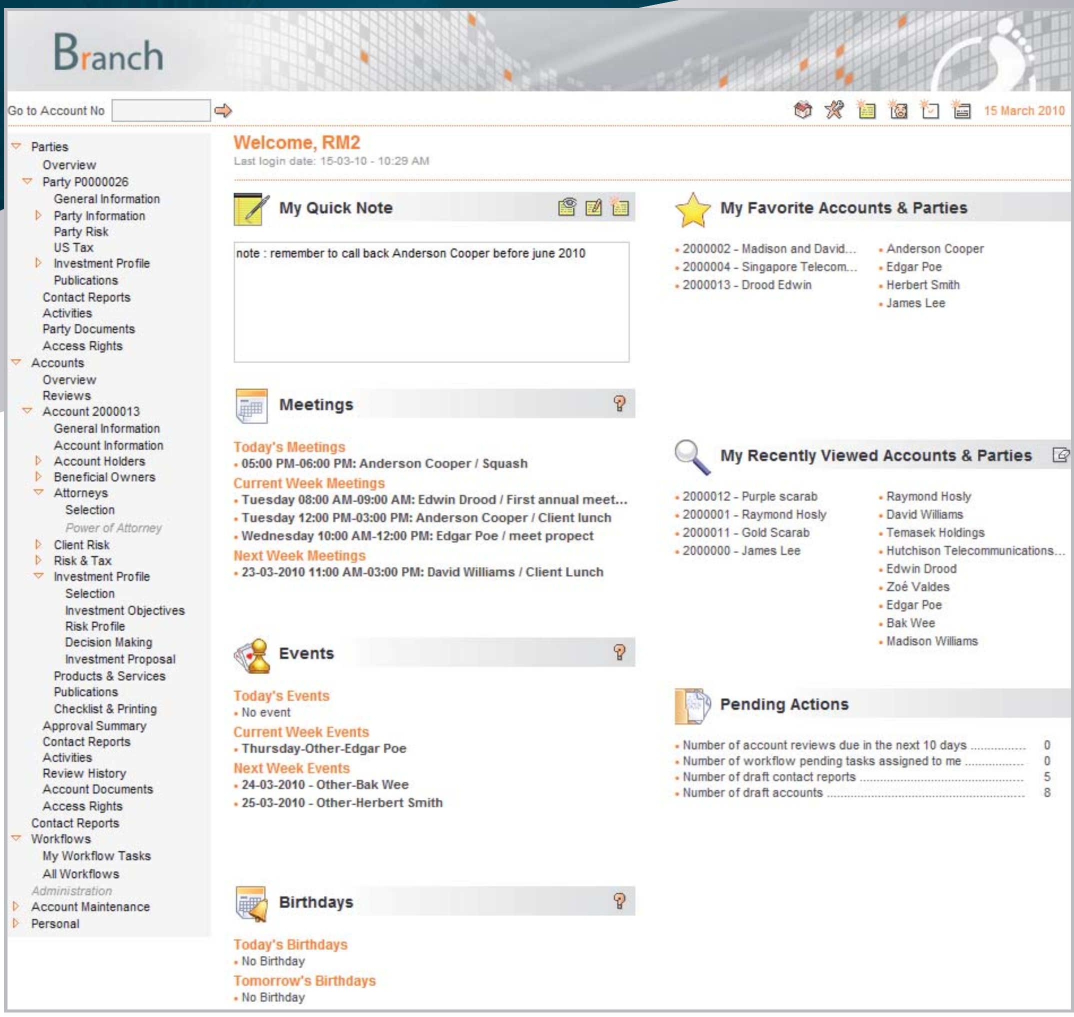
newaccess banking software

Branch® CRM

Front office workbench for relationship managers

Branch CRM is a powerful integrated platform for client acquisition and relationship management. Branch CRM is the solution that answers one of the most crucial point for all banking services required by relationship managers to better serve their existing clients and to acquire new ones. Branch CRM gives the possiblity to the managers to increase the availability, integrity, freshness, and quality of information pertaining to their relations. Using Branch CRM, relationship managers instantly gain access to a rich, diverse, and customisable set of functionalities addressing every aspect of their day-to-day activities as well as the global management of their activities.

Branch CRM allows collaborative work within your bank while ensuring business workflow efficiency and data integrity using business-driven access rights.



www.newaccess.ch
For more information, please contact sales@newaccess.ch

one step ahead

Branch® CRM

Day-to-day client relationship management:

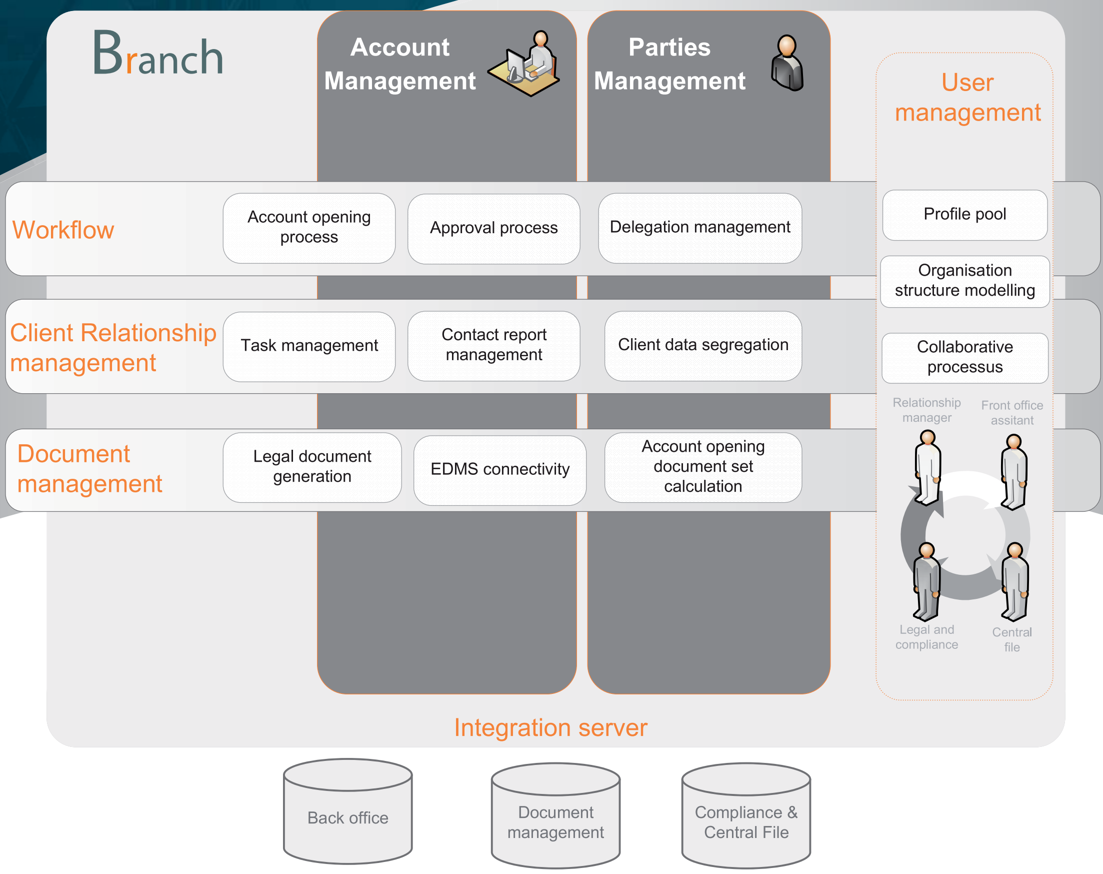
- Client contact preparation and follow-up
- Tasks management for day-to-day business (meeting, event, gift and card management)
- Contacts reports management
- Account documents management
- Accounts documents generation

Full account opening process management:

- Prospect management
- Client data structured acquisition system
- Workflow driven validation process
- Account opening document generation

Key features:

- Client relationship management solution business process automation through an embedded workflow management system
- Customisable business rules and workflows
- Customer relationship building and follow-up tools
- Business-driven user access rights management
- Workflow task management & delegation
- Collaborative platform (Relationship managers, assistants, legal & compliance, central file)
- Account review process
- Data segregation by relationship manager or team



The entire range of New Access products and solutions is fully compatible and cross functional with each other. We give your infrastructure the possibility of bridging CRM data, documents, portfolios and reporting systems.

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