

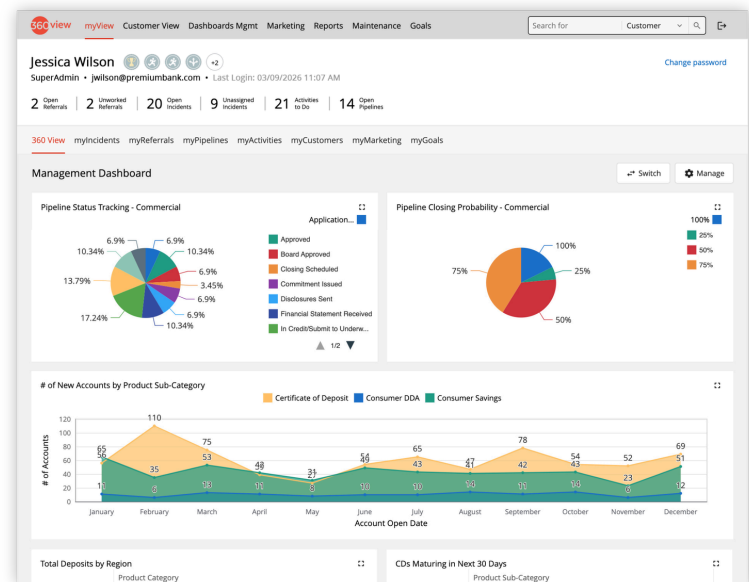


The CRM built by bankers, for bankers

Abrigo's Banking CRM Platform, powered by 360 View, goes beyond traditional CRM by bringing customer information into a single view and provides tools to automate processes, uncover opportunities, and strengthen customer relationships. The customizable suite helps banks and credit unions improve team performance, deliver more personalized service, and support growth.

Banking CRM Platform

The suite of solutions can be customized to meet the needs of your bank or credit union.



360 View CRM

Give your teams a complete view of customer relationships to deliver personalized service and identify opportunities for growth.

- ✓ **360-degree customer view:** Consolidate customer accounts, relationships, touchpoints, and preferences in one place through core and other system integrations.
- ✓ **Touchpoint tracking:** Capture interactions across channels to maintain continuity and context throughout the customer relationship.
- ✓ **Custom dashboards:** Surface the metrics and customer insights most relevant to individual teams and departments.
- ✓ **Process automation:** Create and track activities, referrals, pipelines, service requests, and follow-ups so opportunities do not get missed.

Marketing Automation

Use customer data and automation to deliver more relevant communications and support cross-selling throughout the customer journey.

- ✓ **Campaign management:** Create, automate, and track targeted marketing campaigns with built-in reporting.
- ✓ **SmartPops™:** Provide employees with real-time, customer-specific prompts based on data, relevant cross-sell opportunities, or qualifying campaigns.
- ✓ **Personalized communications:** Use customer data and behavior to tailor email campaigns and automate follow-up communications.
- ✓ **Cross-selling and segmentation:** Identify opportunities and create targeted audiences based on customer profiles, behaviors, account data, and product ownership.



"We have achieved **incredible results with 360 View**, and **the CRM has completely changed the way we handle support issue resolution** and customer communication. We are a better bank with better service because of this partnership."

Genevieve Hering

VP & Business Intelligence Analyst, Androscoggin Bank

Actionlytics™

Automatically surface insights from customer data to uncover opportunities and inform business decisions.

- ✓ **Customer segmentation:** Create targeted audiences based on customer characteristics, behaviors, products, and engagement.
- ✓ **Wealth and demographic insights:** Add context beyond account data to build a deeper understanding of customers and their financial needs.
- ✓ **Cross-sell insights:** Identify relevant opportunities based on customer relationships, needs, and behaviors.
- ✓ **Opportunity prioritization:** Use customer intelligence to identify high-potential opportunities and focus resources where they can have the greatest impact.

Customer Profitability

See beyond account balances to understand true account and relationship profitability and inform growth and retention strategies.

- ✓ **Customer profitability insights:** Analyze account and relationship profitability and monitor trends over time.
- ✓ **Cost analysis:** Incorporate institution-specific hard and soft costs for a more complete view of profitability.
- ✓ **Customer ranking:** Understand current and historical customer rankings to support segmentation and retention strategies.
- ✓ **Funds transfer pricing:** Understand how internal pricing, interest rates, and cost structures affect profitability.

Goals and Incentives

Automate goal and incentive tracking to give employees visibility into their progress and managers the insights to coach for success.

- ✓ **Automated tracking:** Streamline the process of setting, tracking, and administering employee goals and incentive programs.
- ✓ **Manager dashboards:** Monitor individual and team performance and spot opportunities for additional support.
- ✓ **Employee scorecards:** Provide at-a-glance visibility into performance against goals and key performance indicators (KPIs).
- ✓ **Plan and payroll management:** Manage incentive programs for different roles and teams and streamline incentive data for payroll.

