

Microsoft Dynamics CRM for Banking

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SOFTWARE SOLUTIONS

Microsoft Dynamics



Boost customer retention, proactively manage risk, slash operational costs, and more effectively monetize customer data with Microsoft Dynamics CRM.

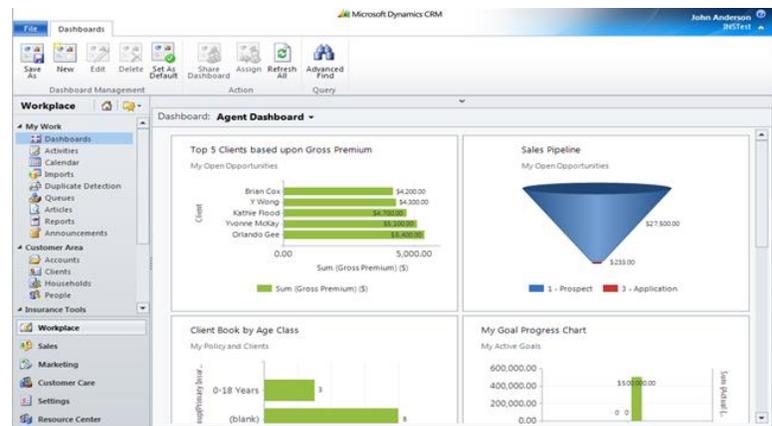
A superior customer experience and personalized service are key differentiators for banks in today's competitive economy. By giving banking professionals a 360-degree view of customer information combined with real-time analytics and robust process automation capabilities, Microsoft Dynamics CRM helps banks deliver more timely products, more accurate service, and more meaningful interactions.

Deepen Customer Knowledge with 360-Degree Views

Consolidate data silos from tellers, advisors, branches, self-service websites, back-end systems, and more to create a unified customer view including account information, customer profitability, interaction history, banking preferences, and behavior so you can provide a superior customer experience and target the right offer at the right time.

Better Manage Risk

Analyze segmented customer data and seamlessly integrate with key systems to identify risk-elevating behaviors such as late payments, low credit rating, and other triggers so you can better manage your exposure. Use robust workflow capabilities to proactively identify issues, automate key processes, and meet regulatory requirements.



Provide a complete view of customer information to bankers, advisors, managers, and branch employees so they can provide the highest level of service.

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Improve Operational Efficiency

Automate manual processes to help eliminate unnecessary work and reduce operational costs across branches, call centers, and offices. Establish CRM-related key performance indicators and monitor them via individual and aggregate performance dashboards

Improve Customer Satisfaction and Loyalty

Ensure pricing and banking policies are aligned to your retention strategies by analyzing their impact on overall customer relationships. Better understand customer preferences and provide superior advisory services to improve wallet share and loyalty.

"Microsoft Dynamics CRM allows my loan staff to more efficiently organize and use customer information so that they can handle more deals at once."

Gina Lappano, VP of Operations, Agchoice Farm Credit

Acquire New Business

Conduct integrated, multichannel marketing campaigns, seamlessly track and convert leads, and identify your most effective marketing activities as you optimize your marketing mix.

Extend Existing IT Investments

Take advantage of the inherent flexibility of Microsoft Dynamics CRM to integrate with mission-critical business applications and existing Microsoft products so you can maximize the value of current IT investments.

Build Long-Term Relationships

Better manage broker and customer relationships, building loyalty based on trust by providing greater transparency and personalizing service.

"Manual, paper-based tasks have largely disappeared, improving our efficiency in customer relations. By having a better overview of current activities, as well as improved contact and lead management, a greater number of potential customers can be addressed."

Peter Stumpe, Head of Asset Management, Raiffeisenbank Kleinwalsertal

Take Advantage of the Cloud

Benefit from Microsoft's multi-billion dollar investment in the Cloud, leading security infrastructure, and a 99.9% uptime SLA with Microsoft Dynamics CRM Online

Native Microsoft Outlook User Experience

Enable your people to work using an application they're already familiar with: Microsoft Outlook. With a native Microsoft Outlook user experience, Microsoft Dynamics CRM helps make CRM easier to adopt and cuts down on training time and cost by using tools people already know.

One Place to Manage Leads, Contacts, Accounts

Give your people one place to view and manage contacts, accounts, leads, products, opportunities, cases, and more so that they can work more productively and spend more time with clients rather than hunting for information.

Consolidated Customer Knowledge

Create a one-stop-shop of customer and product information, FAQs, knowledge base articles, and best practices for improved customer service and reduced operational costs. Empower team selling by giving your people collaborative tools and a single view of customer information.

Boost Sales Performance

Enable your advisors and call center staff to capitalize on new opportunities in real time with 360-degree customer views and contextual analytics. Improve cross-sell conversion rates across checking and saving accounts, home equity, loans, fixed income products, and credit card services. Shorten sales cycles and improve sale forecast accuracy with repeatable sales processes and intelligent workflows.

Compliance Management

Automate regulator-required processes and provide a detailed audit trail to help ensure full compliance with regulatory standards while protecting privacy and confidentiality. Centralize and streamline execution of critical business processes with automated workflows to help ensure all steps are completed on time and within approved, compliant procedures.

Mobile Access

Enable mobile employees to work productively using a variety of mobile devices to access client and product information, contact customers, receive alerts, and more. Help ensure advisors are better prepared with access to customer data, preferences and account holdings no matter where they are.

Marketing Automation

Identify high-value targets and develop targeted marketing campaigns and outreach efforts to attract new clients and improve household product ratio. More effectively segment customers using rich data and demographics, build lists of prospects, create and manage campaigns, and measure the return on investment of marketing efforts.

Actionable Analytics

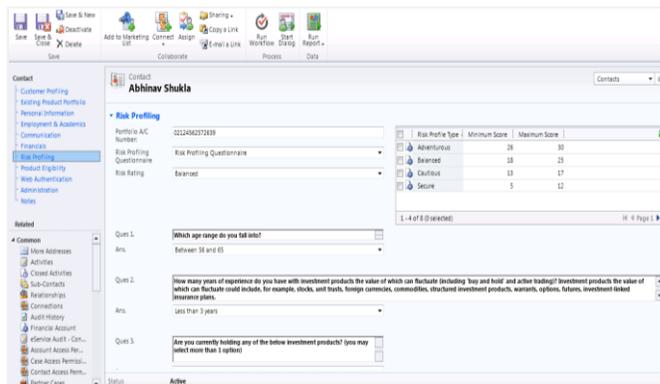
Provide your sellers and agents with personalized dashboards, contextual analytics, and flexible goal management capabilities to help them track performance, stay on schedule, and work more productively.

Streamlined Service Delivery

Give your people convenient, role-based access to complete customer data, tools to automate cross-departmental collaboration, escalations, and follow-up, and guided selling scripts so they can deliver streamlined services that delight customers.

Easy Customization

Take advantage drag-and-drop customization tools and a flexible object model to tailor Microsoft Dynamics CRM to the specific needs of your organization so you can bring new services to market quickly and cost-effectively.



Enable team collaboration across divisions, orchestrates business processes, and provide better visibility into risk exposure.

Jumpstart Productivity with Microsoft Products Leverage the powerful capabilities of productivity-focused solutions like Microsoft Office, Microsoft Lync, and Microsoft SharePoint Server right within Microsoft Dynamics CRM to enhance real-time communication, enable enterprise-wide collaboration, streamline content development, and improve the document management process.

A Vendor You Can Trust

Benefit from working with Microsoft, a vendor with over 30,000 engineers, that invests over \$9 billion in R&D annually, has partners in 82 countries, and provides Microsoft Dynamics CRM through multiple delivery options all based on the same architecture: on-premises, cloud and partner hosted.

Contact a Microsoft partner to find out how Microsoft Dynamics CRM can help your business. Or to find out more about Microsoft Dynamics CRM, visit: <http://www.microsoft.com/dynamics/crm>
United States and Canada toll-free: (1) (888) 477-7989 Worldwide: (1) (701) 281-6500

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