360 view

The CRM Platform Product Overview

YOU NEED TO GROW—WE HAVE THE TOOLS TO MAXIMIZE YOUR TEAM'S PERFORMANCE

360view

PRODUCT OVERVIEW

At 360 View, we have one mission: to provide the best customer relationship management platform for banks and credit unions in the business.

Our solution goes beyond CRM offering a complete suite of tools known as The Growth Platform. With more than 20 years experience serving the financial industry, we understand the challenges you face and are committed to working with you to ensure success.

360 View imports data as often as daily from your core banking application and third-party providers into one central database where the customer relationship is rebuilt from the account level up, providing you with one 360-degree view of your customer. With a web-based front-end and Microsoft SQL Server database back-end, this software solution can reside on your internal network server or be hosted for unlimited access by your employees.

CRM

Personal Relationships, Enhanced by Technology

- Customer View of existing relationships
- Referral Tracking and Reporting
- Incident (Customer Service Resolution) Tracking and Reporting
- Pipeline Tracking and Reporting
- Activity Tracking of past and future activities
- Prospect Management – manual creation of prospect record or import of multiple records
- Two-way Outlook integration for emails and calendar
- Mobile Application

Predictive Modeling

- Next best product for consumer and business customers
- Attrition for consumer and business customers

Profile Management

- Unlimited customizable Q&A
- Import Customer Survey results and more

Sales Automation

- Employee Workflow automation
- Management and Employee Dashboards

Reporting

- Over 150 Standard Reports
- Build your own report with our easy-to-use Report Writer
- Schedule Reports

Marketing Automation

Scalable Personalized Communication

Campaign Creation & Management

- Customer and Product On-Boarding Automation
- Cross-sell Campaigns
- Email Marketing Automation

SmartPops™

- Customer-specific pop-up sales and service messages during any customer interaction
- Complete tracking and reporting

Analytics

Data Analytics for Better Results

- Append wealth and demographic data to customer and prospect records
- Discover your next best prospect and drive growth with targeted campaigns

Profitability

Understand & Grow Your Customer Relationships

- Funds Transfer Pricing
- Account Profitability with roll-up to Customer
- Asset Pricing
- Loan Loss Provisions
- Soft Cost Parameters

Goals & Incentives

Motivate Employees to Empower Sales Efforts

Tracking & Reporting

- Automation of G&I Plan with daily updates and scorecards
- Export Payout reports for Payroll

Other Services

Assistance with the development and rollout of a new module and process within the institution

- General Training & Support
- 360 View Professional Services
- 360 View API
- Deployment (ASP Hosted or Bank Hosted)

CRM

Personal Relationships,
Enhanced by Technology

Customer View

360 View will allow you to see a complete and convenient Customer View of your customer that combines in a dashboard an overall summary of Products, Services, and Relationships. Here you will see primary and secondary account ownership, a graphical representation of Deposits to Loans, all outstanding work items (i.e. Open Referrals, Pipelines, and Incidents andTo-Do items), cross-sell opportunities, household relationships, direct relationships, center of influence relationships, deposit-signers, and loan-guarantors.

Referral Tracking

Referral tracking and management is at the heart of the 360 View system. Here you can easily create referrals directly from customer or prospect inquiry and send them to other employees or departments in seconds. Referrals flow through the system from Customer View to myView instantly, while email reminders to your email box outside the system help ensure you are never out of touch. Referral creators will be happy with the convenient Referral Sent tracking, which enables them to monitor the progress of all referrals sent so they can help push them along toward new account opening and incentive payout. 360 View automatically closes open referrals upon new account opening without user intervention.

Incident Tracking

Incident Tracking allows you to eliminate manual processes and incorporate your team into the resolution of your customer incidents or work flow tasks. Any employee can create a customer incident and pass it along for resolution within seconds. Incidents are tracked throughout work flow resolution so repeated customer inquiries can easily be answered by anyone with system access, and incidents not resolved within pre-determined time limits will be escalated for management involvement. Ever wonder how many times your customers lost their debit cards last year or complained about customer service? 360 View Incident Tracking makes the answer one standard report away.

Pipeline Tracking

Open a new pipeline for loans or other products, on any customer or prospect, while assigning security and close probability so that you can track Pipeline progress to ensure you are prepared for your next management meeting. Build your existing work flow process into Pipelines and save hundreds of hours per year with complete reporting.

Activity Tracking

Record your important customer and prospect interactions to share with others so everyone stays “in the loop” and can be more responsive the next time they are called upon to interact with a customer or prospect. Track your sales activities and automate reporting. Convenient email forward capability allows you to “blind copy” any other employee(s) of an activity you record so they will get instant notification through regular email. Record all your customer or prospect follow-ups for tracking within 360 View with two-way Outlook integration. Seeing or working activities has never been easier.

Predictive Modeling

Discover the top three next likely products in demand for any particular customer and better target your marketing to meet their needs. See the attrition ranking of your consumer and business accounts and know whether or not your customer is more or less likely to leave your institution. All of this information can be easily viewed on the customer dashboard and can be used for marketing campaigns* and reporting.

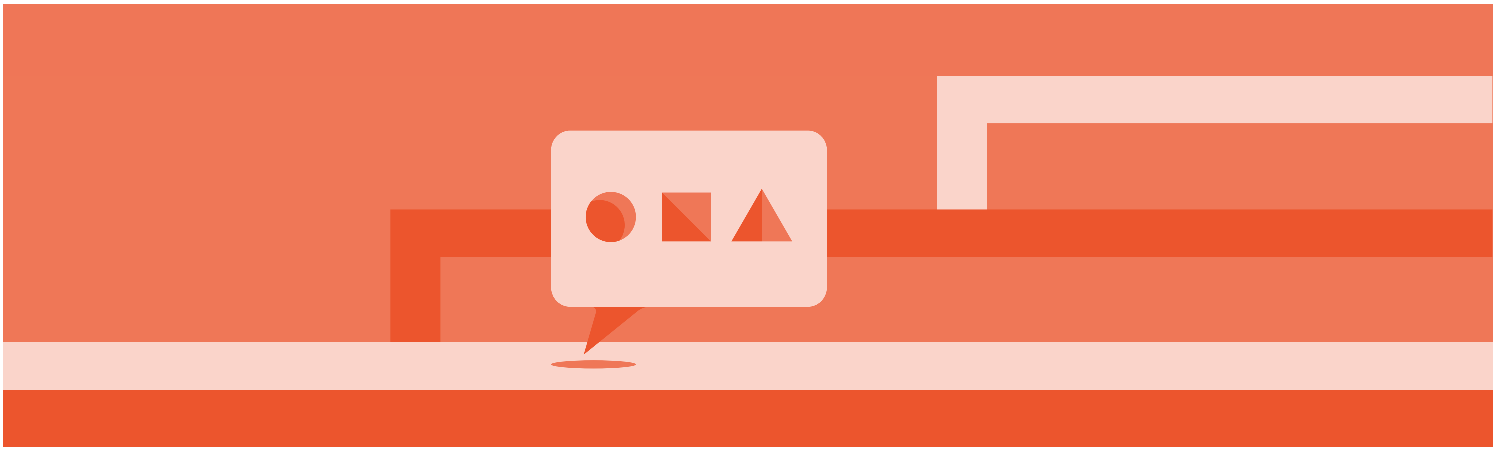
** Requires 360 View Marketing License*

Profile Management

You can design your own profiles within 360 View. You can have different profiles for business and personal customers. In fact you can create as many profiles as you desire for use in varying circumstances. Use 360 View Profiles to manage your financial statements, annual surveys, or any additional demographic information to enhance your knowledge base. All profile information is available for data-mining via the 360 View Marketing Wizard which means you can access this information at any time with just a few clicks of the mouse.

Sales Automation

360 View provides everything your sales team needs to prospect, manage contacts, work your pipelines, record to-do activities during the sales process, and ultimately close more business opportunities while recording all of this directly into 360 View.



MARKETING AUTOMATION

Scalable Personalized Communication

Marketing Campaign Creation & Management

Data-mine your customer, prospect, and 3rd-party information located within 360 View using our easy query tool (Customer or Account Wizard), to quickly create lists from within 360 View. You can save and use these lists in 360 View or export to CSV format file for external management. Create unlimited marketing campaigns with our on-boarding capabilities using trigger events to drive the offers within your campaign. Create as many offers for your campaign as needed (direct mail, email, personal follow-up, broadcast cross-sell, and more), define your measure of success, and record each activity along the way while tracking and reporting on the success of each campaign.

SmartPops™

Add SmartPops™ to 360 View and boost your CRM ROI by as much as 400-500% over the next 12 months! This application-monitoring software can easily be installed on any workstation to monitor your web-based or desktop applications for customer unique information. Cross-sell messages will "pop" each time the system determines a match between the customer you are currently serving and an existing cross-sell stored in the CRM database, even if you are not logged into CRM. (requires separate license)

Cross-Sell Opportunities & Companion Product Suggestion

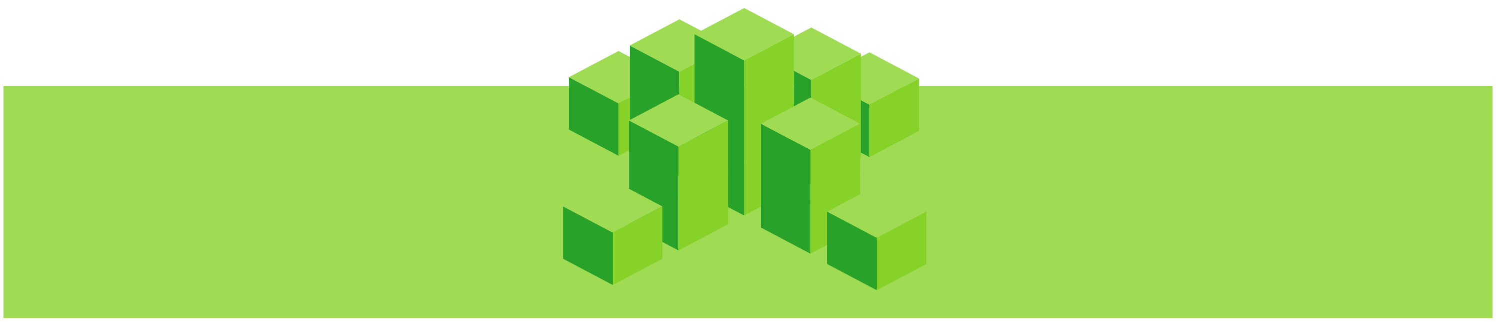
Cross-sell products are suggested from Predictive Modeling, the 360 View Marketing Wizard, or 3rd party imports for easy view within the customer profile. You can even assign the cross-sell priority within system maintenance to ensure your best cross-sell source takes precedence over all other cross-sells and gets presented first. Cross-sells linked to 360 View campaign management can be presented for a pre-determined period of time and then recalled; cross-sell success is measured and reported as a phase, recalled, worked and tracked.

ANALYTICS

Data Analytics for Better Results

Analytics becomes “Actionlytics” when the right data is integrated with your marketing and sales strategy effectively leading to desired results. Actionlytics™ is 360 View’s own analytical intelligence. Get instant access to demographic and wealth data powered by WealthEngine™—putting you in the position to create models and segmentation programs for customer retention and growth opportunities.

WEALTHENGINE



PROFITABILITY

Understand & Grow Your Customer Relationships

View customer and account level profitability to understand your top customers and their trends. 360 View Profitability utilizes funds transfer pricing and provides complete transparency so users can understand each calculation. See month-to-date profitability statements, 24-month trends, and customer rank—use this information to better build your next customer retention campaign.

- Quickly know the value of your accounts and household relationships
- See customer ranking, trends, and month-to-date profitability
- Beyond just the customer’s account balance, see true account profitability
- Get hard costs import from account and soft cost allocations
- Know that data is based on your cost to do business, not an industry standard
- See a customer’s value over time
- Create retention programs around your best customers
- Build growth programs to develop your unprofitable customers

STANDARD REPORTS

Below is a sample of some of our standard reports.

360 View has over 150 standard reports and the ability for you to customize an unlimited number to meet your needs with our easy-to-use Report Writer. Schedule or denote your favorite and most frequent reports for easy access.

MCIF Basic Reports

- Household Penetration Report
- Household Loss Report
- Customer Product Group Cross-Sell Report
- Account Distribution by Product Category
- Balance Distribution by Product Category
- Branch Summary of Average Services Per Customer
- Customer Summary Report
- Product Type Averages Report
- Product Usage Report
- Branch Region Penetration Report
- Summary of Services Trends by Customer
- Management Change in Relationship Summary by Customer

Standard Marketing Lists

- Single Service Households
- Customers with Birthdays next Month
- Maturing CDs

Customer Account Reports

- CODs Maturing
- Customer Accounts By Open Date
- Customer Accounts By Employee
- Customer Value Deposit Index

Contact Management

- Activities Completed By Employee
- Activities To Do By Employee
- Customer Activity Summary
- Management Summary Report

Referral Reports

- Closed Referrals Report
- Customer Referral Summary
- Customer Referrals and Activities
- Referrals Received Sales Report

Cross-Sell Reports

- Cross-sell Ratio by Branch
- Cross-sell Ratio Opened By

Pipeline Reports

- 3 Month Active Pipeline
- Pipeline Loan Status
- Pipeline Report by Employee

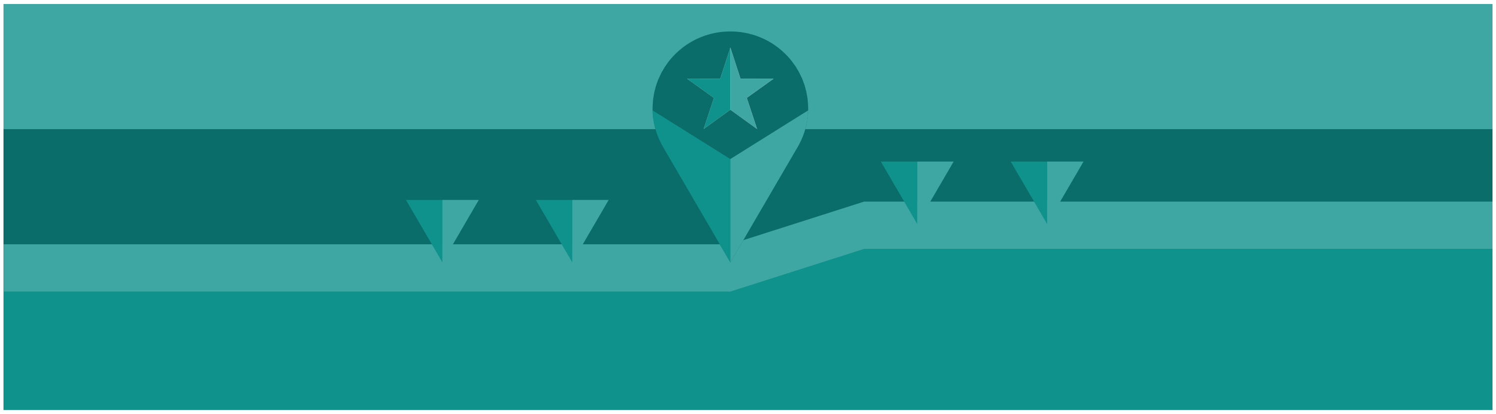
Incident Reports

- Incident Summary by Type
- Customer Incidents and Activities
- Incidents Summary by Region and Branch
- Incident Summary by Employee

Profitability

- Branch Profitability Summary
- Change in Relationship Summary
- Customer Attrition
- Customers Profitability Ranking Report
- Distribution by Account Balance
- Distribution by Account Holder Age
- Distribution by Branch
- Distribution by Product
- Geographic Penetration
- Household Profitability Decile
- Management Summary of Services Trends by Household
- Product Summary
- Product Summary Detailed Report
- Top Customers
- Top Customers by Branch
- Top Customers by Employee
- Top Households
- Top Households by Branch
- Top Relationships

And Many More...



GOALS & INCENTIVES

Motivate Employees to Empower Sales Efforts

360 View offers unlimited goals and incentives management by incorporating your plan into the 360 View parameters for individual or group-based calculations. With daily updates, 360 View Goals and Incentives will save you approximately 80% of manual time spent in the past. Employees have access to timely information allowing them to see where they are in meeting their goals and what they need to achieve them along with any payouts.

OTHER SERVICES

Assistance with the development and rollout of a new module and process within the institution

Training & Support

- Project management
- Bank-site group training
- Internet training and help
- Hands-On Training at 360 View in Nashville
- Phone supported help desk
- Online documentation
- 360 View Community website with access to forums, videos, training resources, etc.
- The View – Annual users conference for learning and networking

360 View Professional Services

360 View Professional Services offers you the guidance and industry expertise to take your CRM to the next level. We can help you best implement 360 View and develop the right programs to support your CRM initiatives. 360 View Professional Services include: CRM Strategy, CRM Mentorship, Marketing Campaigns, Outsourced CRM Admin, and General Consulting.

360 View API

With 360 View API (Application Programing Interface) you can query main CRM Objects (customers, accounts, referrals, incidents, pipelines, activities) and add/update any of those objects. This allows you to integrate to any of your 3rd-party systems.

Deployment (ASP Hosted or Bank Hosted)

Software is conveniently deployed through an SSAE16 Compliant Application Service Provider (ASP) providing remote Internet access and hosted in the cloud in advanced and secure technological facilities. The highest consideration has been given for data privacy in accordance with all governmental regulations concerning financial institutions. All software distributed over the World Wide Web is encrypted with SSL encryption.

Bank Hosted with unlimited number of users.

OTHER SERVICES

Assistance with the development and rollout of a new module and process within the institution

GET IN TOUCH

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