



AVANADE®

Enterprise CRM for Financial Services™

Strengthen customer loyalty, increase sales, and deliver better customer service to high value clients by ensuring your employees have comprehensive customer information at all touch points.

Complete integration with Microsoft® Outlook provides a familiar, easy to use interface resulting in high user adoption and faster ROI.

Today, financial services organizations are struggling to increase profitability and grow in an environment of intense competitive and regulatory pressures, complex economies, and tightened budgets. In addition, it's becoming increasingly difficult for these organizations to differentiate their products in the minds of consumers. Retaining customers and finding ways to identify and service unfulfilled client needs are essential to overcoming the barriers to growth.

A complete picture of each customer relationship is the key to better service and faster growth.

Many financial institutions have an account-based view of their customers that does not tie into other data. Critical client information is not accessible when it's needed which results in lost opportunities and even lost customers.

- ▶ Are your employees limited by a one-dimensional view of your customers?
- ▶ Are you missing out on cross-sell and up-sell opportunities?
- ▶ Can you point to your financial institution's most profitable customers and do you understand why they're profitable?
- ▶ Have you learned how to retain profitable clients and attract new ones?
- ▶ Can your financial advisors proactively make accurate recommendations based on clients' needs and wants?
- ▶ Are you coming up short in the service you're able to offer your highest-value clients?

Empower your employees with access to the information they need to strengthen customer relationships.

Collect critical information from every customer interaction and give your employees a 360° view of all your customers. With that breadth of information you can deliver superior customer service and customize offerings that will differentiate your organization and help you attract and retain high-value customers.

- ▶ Get a fully integrated, comprehensive customer view including client profile and history, portfolio accounts, relationships, and support records.
- ▶ Find out who your best clients are and offer them the right product at the right time—every time.
- ▶ Analyze profitability on products, accounts, clients, business units, and your organization as a whole, to focus critical resources on key revenue opportunities.
- ▶ Improve client satisfaction, reduce churn, and increase share-of-wallet.

LINE OF BUSINESS SUITE

Address unique needs of financial services lines of business with powerful functionality like relationship profiling and insight, quote and deal management, marketing and Microsoft Office System-based access to CRM data.

- ⇒ **Wealth Management:** Manage the extensive detail involved, and offer high net worth individuals intelligent, personalized counsel for protection and growth of assets, tax and retirement planning and related matters of personal finance.
- ⇒ **Commercial Banking:** Gain insight into customers' product and service usage at any point of contact in any channel.
- ⇒ **Investment Banking:** Improve your ability to service complex multi-entity investment relationships involved in mergers, acquisitions and corporate restructuring, and support investor advisory services.
- ⇒ **Retail Banking:** Benefit from a holistic view of customer information, revealing opportunities to cross-sell as well as to reinforce relationships for competitive advantage.

Choose a smart, flexible CRM solution with unparalleled functionality for the Financial Services industry.

Avanade has joined forces with Microsoft® and GaleForce Solutions® to bring CRM to a whole new level. Designed specifically for wealth management firms and investment, commercial, and retail banking, Avanade Enterprise CRM for Financial Services solution delivers everything financial service Account Managers, Financial Advisors and Customer Service Representatives need to strengthen customer loyalty, increase sales, and deliver better customer service to high value clients.

- ▶ Select the CRM platform that's customized to support the unique business processes, security requirements, workflow, policies, and terminology of Financial Services organizations.
- ▶ Fine tune this solution to match the processes and needs of your specific line of business.
- ▶ Take advantage of our holistic approach to CRM implementations to ensure you can utilize all your data—from your oldest legacy systems to your newest customer contacts.
- ▶ Access the critical information you need via an easy-to-use, familiar Microsoft Outlook screen.
- ▶ Cut your organization's risk by deploying this highly-scalable system in phases that you control.

Our unmatched experience and key alliances gives you the edge you need to compete and win in today's financial services environment.

- ▶ The Avanade Enterprise CRM team comes with deep experience and expertise in the full range of Microsoft solutions, services, platforms, and development tools.
- ▶ Avanade Enterprise CRM builds on GaleForce Solutions' industry-specific extensions and enhancements to core Microsoft CRM technology to bring you a cost-effective, easy-to-use, high performance CRM solution for the Financial Services industry.
- ▶ Avanade has deployed Microsoft CRM solutions in the enterprise more often than anyone else in the industry.
- ▶ Avanade's repeatable ready-to-use assets decrease implementation time, reduce integration costs, cut training time, and easily integrate with existing systems.

About Avanade

Avanade is the leading technology integrator specializing in the Microsoft enterprise platform. Our people help customers around the world maximize their IT investment and create comprehensive solutions that drive business results. Additional information can be found at www.avanade.com.

To learn more about how Avanade can assist you, visit our website at www.avanade.com or call one of our major offices:

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