



Redesigning Customer Experience

Remain Relevant in the Digital Age with Cirrus Shield CRM

More than ever before, the Financial Services industry is paying attention to digital technologies and financial technology (FinTech) innovations. As barriers to entry fall, once well-installed financial institutions are being challenged at every level. This development is prompting new solutions and highlighting the need for fundamental change.

To remain relevant in a digital age, financial institutions need to be able to deliver innovation rapidly. Failure to invest appropriately in secure, agile systems that can enhance customer experience can result in a significant loss of business. This is especially true for banks that struggle with core legacy systems that are unable to facilitate the kind of experience, service, and product selection customers expect.

Cirrus Shield for the Financial Industry gives you the tools to accelerate the pace of innovation and deliver a renewed customer experience. Cirrus Shield is easy to integrate with your legacy systems and is a secure, agile system that allows you to provide your customers with seamless experiences across a variety of channels.

When coupled with a consulting approach to bring Business and IT together, Cirrus Shield can be leveraged as a rapid application development platform to deliver applications that bring true business value to both institutions and their customers.

Also, Cirrus Shield is well positioned as a front-end platform that supports the delivery of innovative applications that integrate legacy databases and new data sources (Internet of Things, Big Data) to produce actionable knowledge and real time information directly available to the end users.

Strengthen Relationships with your Clients

We're at a time where technology is your main competitive advantage, allowing you to offer your customers with more speed, personalization and value. Build long-lasting relationships with your customers by delivering smart and personalized service anytime, anywhere.

Better Manage and Convert your Leads

Integrate Cirrus Shield within your IT landscape to consolidate lead information and behaviors into one place for the advisors. Cirrus Shield's unique capabilities in terms of integration and user interface allows your advisors to better manage and convert your leads into clients.

Maintain Regulatory Compliance

Cirrus Shield is a strong and secure platform as a service that can be deployed in a public cloud, private cloud or on-premises in your own data center. Maintain regulatory and data privacy compliance by selecting the right deployment option.

Accelerate Innovation

Innovation is the single most important factor driving sustainable top- and bottom-line growth in the financial services industry. Cirrus Shield allows you to deliver innovations in a much faster way all the while meeting strict compliance rules and regulations. Cirrus Shield also integrates nicely with your existing systems so the effort of setting it up is minimal.



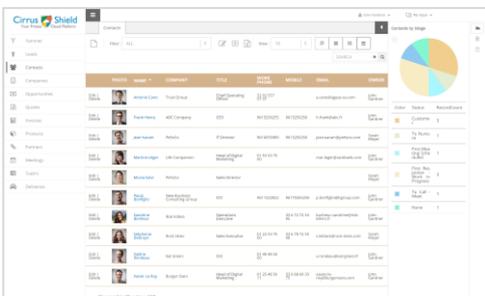
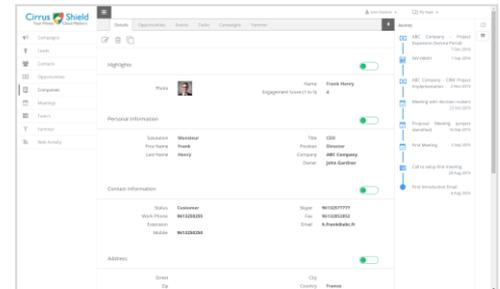
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Features Highlights

Cirrus Shield for Financial Services offers a set of capabilities that are specifically built for Financial Services institutions. Those capabilities allow for a faster time-to-market when implementing a project and can be further customized to meet the specific requirements of the project.

Distribution

- Get a 360° view of your customers including relationships with household members or others, life events, financial transactions, holdings, securities.
- Keep track of the history of interactions with your clients.
- Get an overview of the client's financial needs and goals.
- Manage your online sales from lead to cash, integrating a quotation engine, e-payment.

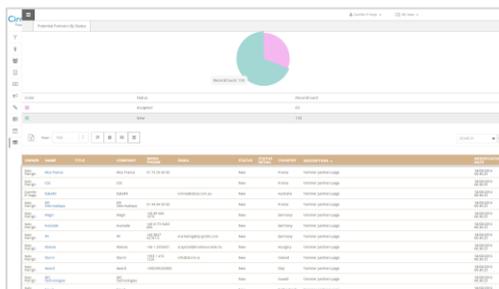
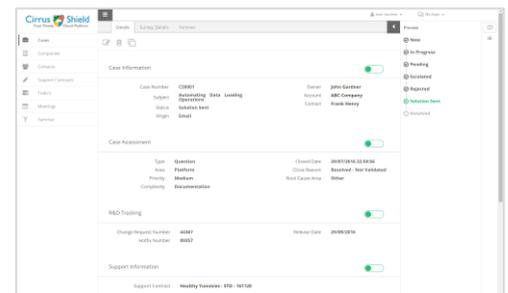


Operations

- Streamline and improve your internal processes with a case management system.
- Suppress paper forms by allowing your advisors to create loan origination applications directly on their tablet/computer.
- Create and deploy electronic forms to manage your internal processes in a matter of hours.

Customer Service

- Customers can access all their accounts, transactions, claims, etc. and interact with you directly into the customer portal.
- Manage all customer requests and standardize your support processes.
- Manage complaints with an easy to use tool accessible both by your complaint management team and the customers.
- Measure your support quality systematically with Customer Surveys.



Reports and Dashboards

- See in a glimpse the information you need with Cirrus Shield reports and dashboards.
- 20 reports and dashboards provided in standard to manage the different aspects of your Financial Institution.
- Create your own custom reports and dashboards to track your specific KPIs.

Plans start at 15€ per user per month

[Learn More](#)

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[Get Started](#)

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