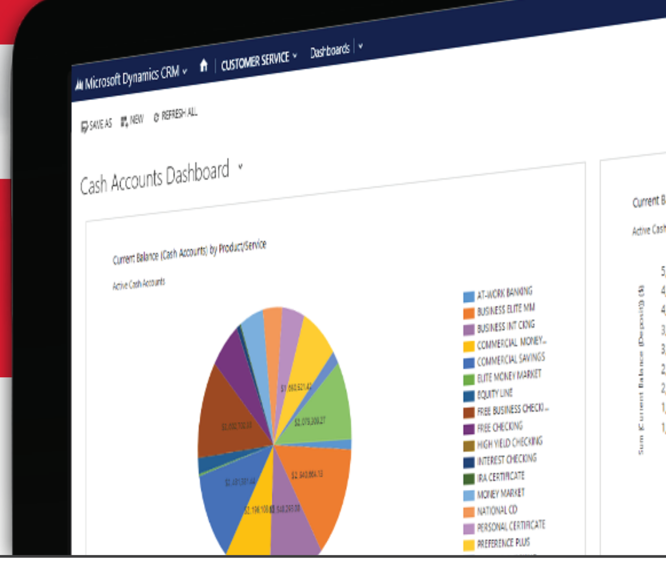
Hitachi Solutions

# Hitachi CRM for Banking




## PURPOSE-BUILT RELATIONSHIP MANAGEMENT FOR THE BANKING INDUSTRY

Hitachi CRM for Banking gives bankers a holistic, customer-centered view of their business that helps them build strong, long-lasting relationships with their customers. Our solution helps you better understand, track, and manage your relationships with customers and prospects so you win more business and improve customer loyalty.

Hitachi CRM for Banking enables bankers to:

- Gain a complete, 360-degree view of every customer, including profile, interaction history, products owned, and financial needs
- Communicate the right information and deliver compelling offers to customers no matter where and how you interact with them
- Put information into context and make well-informed decisions using dashboards and reports that are customized to each job role and line of business
- Work together effectively with a single, consistent view of customer, products, and offers across lines of business.

## Why Hitachi Solutions

We offer deep industry expertise combined with decades of experience providing high-value solutions that deliver rapid return on investment. Our approach is designed to give you a faster, lower-risk implementation and rapid adoption through proven best practices.

- It starts with **core technologies** built on the Microsoft CRM platform so you can get up and running quickly
- We extend that with our own **industry modules** that give you capabilities tailored to the needs of the banking industry
- Finally, we deliver a **customized solution** to provide the best fit for your business, so you can focus on your unique strengths, not on basic technology

## CRM Built for Banking

Hitachi Solutions provides CRM that's built for banks. All of our Hitachi CRM for Banking modules include:

- Familiar tools that are easy to use built on the Microsoft Outlook user experience.
- Core integration with marketing, lending, service, and back-end core banking systems.
- Mobility providing access to customer data, collaboration, and schedules wherever you are.
- Marketing automation that enables you to accurately track the ROI of each marketing action.
- Customer service with consolidated customer data and automated resolution and follow-up.

## Commercial Banking

Uncover new opportunities and execute more effectively with collaborative tools that give everyone a complete view of customers, prospects, and opportunities. Our Commercial Banking Module gives you the information you need to build strong, profitable relationships with your clients.

- Single view of business customers and their relationship with the bank
- Automated and streamlined processes including client onboarding and RFP response
- Modeling for complex relationships between businesses, owners, investors, and households
- Collaborative tools for sharing documents, information, and alerts for projects and deal teams

## Retail Banking

Provide a superior customer experience and win long-term loyalty from your customers. Our Retail Banking Module gives you the tools you need to put the customer at the center of every interaction with a complete and holistic view of customer, financial, and business data.

- Role-based dashboards for tellers, relationship managers, branch managers, and back-office staff.
- Customer, household, and account management
- Integrated cross-sell and up-sell with every interaction
- Complete view of customer profile, history, and financial products across lines of business

## Wealth Management

Provide superior advisory services to your customers and offer them financial options that are tailored to their needs. Our Wealth Management Module gives your people streamlined tools and access to customer information, financial data, and targeted offers that help you win the customer's trust and loyalty.

- 360-degree view of clients, households, assets, liabilities, and products across lines of business
- Portfolio management, financial planning data models, and built-in best practices
- Activity and service management with automated workflows for meetings and tasks
- Consolidated view of portfolio, holdings, transactions, and market values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