



“ We chose BankSight because it offers a seamless experience across multiple business lines for our bankers. It will allow us to grow our business on leads and referrals, and manage our customer relationships easily, and integrates with our loan origination, data warehouse and core systems. ”

- Bank Director of Operations

BankSight Delivers an Enterprise-wide Intelligent Banking CRM solution across 6 Lines of Business in 5 Months

BUSINESS SITUATION

A century old, east coast retail and business bank with \$5B in deposit and lending assets and \$10+ billion in wealth assets under management needed an enterprise-wide CRM application to personalize customer interactions. The community bank also wants to grow relationships by sharing customer insights and sales pipeline information across lines of business and for executive management.

The bank previously used Lotus Notes in its retail centers to manage customer data and referrals, as well as using CRM add-ons to line of business specific origination systems. This required bankers to perform tedious, repetitive data entry while juggling multiple systems with inconsistent processes. While creating inefficiencies at the user level, this approach also did not provide executive management with the comprehensive view they need into the bank-wide sales pipeline. With these issues in mind, the bank looked for a solution with four main areas of importance:

- Integration with a Fiserv Core System and Enterprise Data Warehouse to consolidate and share a single, organization-wide view of critical customer and household information;
- Integration with Baker Hill Advisor and Ellie Mae Encompass to pre-fill commercial loan and mortgage application details respectively, and to share back to CRM the current status of applications as approvals progress;
- Receipt and follow-up of Web-sourced leads from Pardot Marketing, enabling end-to-end management and performance tracking from online lead capture through account opening and funding;
- Ultimately, AI-driven recommendations and financial events to alert bankers of recent financial transactions and other behavior that may indicate unmet customer needs

FULL-SCALE DEPLOYMENT IN MONTHS, NOT YEARS

The bank chose BankSight Intelligent Banking CRM to personalize and coordinate relationship management across their lines of business.

Initially, BankSight deployed lead and referral management for over 200 users in 4 months across their Commercial, Wealth and Insurance lines of business.

The team quickly added 250 users in over 35 Retail locations (including the Mortgage and Consumer Lending teams), extending team-based relationship management to 450 total users across 6 business lines within 5 months of project kickoff.

WHY BANKSIGHT?

BankSight gives bankers better insights to grow customer relationships with less time spent on menial CRM tasks that hurt user adoption.

Bankers see and understand each customer's key account and household details in only two clicks, and access insights they previously searched for across multiple back-end systems. Users also have flexibility to access BankSight's modern,

intuitive user interface through any handheld or mobile or desktop device.

The executive management team benefits from a single, organization-wide view into activity and sales pipeline performance with long-standing customers, new relationships and sales prospects. BankSight's banking-specific solution supports the unique relationship building processes of banking product lines from retail deposit accounts to small business lending and wealth management, while enabling consolidated pipeline reporting across the organization.

THE FUTURE OF CUSTOMER EXPERIENCE

As service grows more personalized and value-oriented across industries, customers now expect the same tailored engagement and relevant advice they receive from services like Amazon, Netflix, and LinkedIn. In partnership with BankSight, this bank is helping reinvent how financial institutions manage customer relationships in order to deliver on these fast-changing customer expectations.

“ We have 450 users in production running in our existing Microsoft Office and Azure environment in less than six months across 6 different lines of business sharing leads, referrals, call reports and a single view of our customers. Our management can see one picture of our customer and prospect pipeline across the bank using Microsoft Power BI for analytics.”

-Bank Director of Technology

“ BankSight is great for referrals in our retail branches, it is a beautiful system that helps us a lot by eliminating manual tracking and enabling our incentives and processes.”

- Bank Director of Retail

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