VeriTouch
Banking CRM Solution

Architecture

BANK USERS & PARTNERS

- BRANCH
- CONTACT CENTER
- TELE-SALES DIRECT-SALES
- OPERATIONS
- MARKETING
- BUSINESS EXCELLENCE

Retail Banking	Know Your Customers	Sales Force Management	Marketing & Campaign Management
Corporate Banking	Contact Center Automation	Contact & Account Management	360 Single View of Customer
SME Banking	Customer Retention	Service Request & Complaint Management	Prospect Management
Private Banking	Loyalty Management	Account Origination	Master Data Management
Affluent Banking	Branch Automation	Social Media Intergration	Online Selling

Distribution Channels

- ONLINE BANKING
- TABLET BANKING
- MOBILE BANKING
- SMS BANKING
- SELF SERVICE KIOSK / ATM
- SOCIAL BANKING

VERiPARK

VeriTouch is an enterprise CRM system targeted for financial institutions. It offers a complete 360 degree view of a customer in a unified front end with solutions for Acquisition, Retention, and Cross-Sell in an Omni-channel architecture.

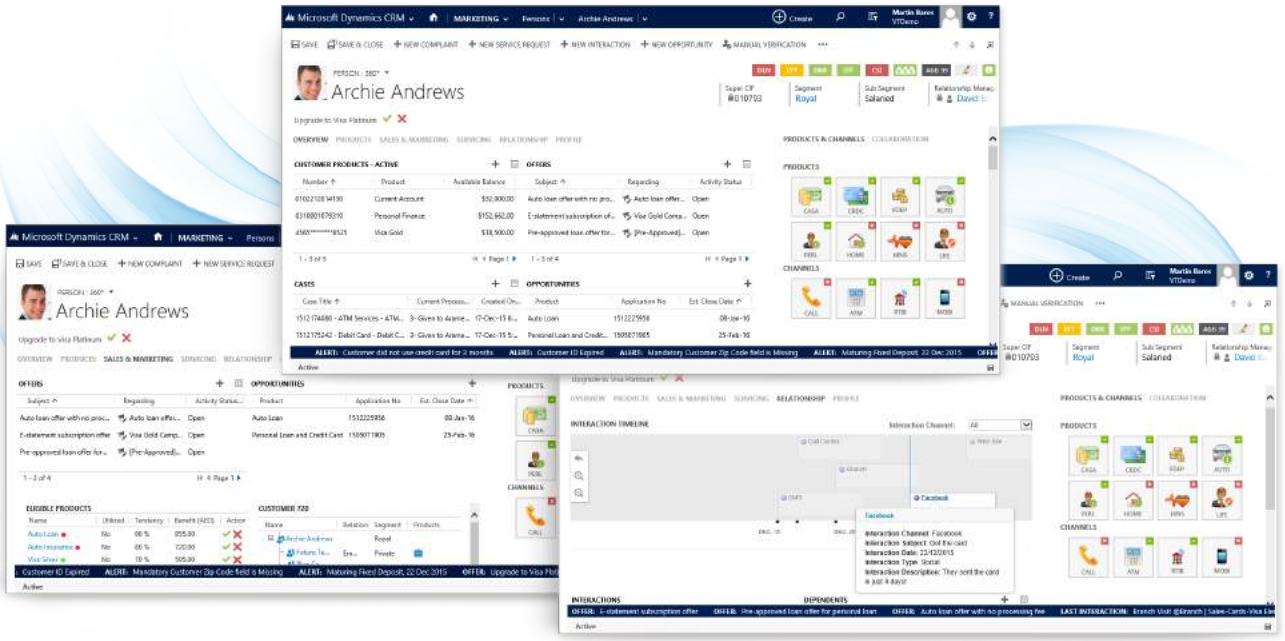
VeriTouch provides many role-based dashboards for effective monitoring of operations. Some popular dashboards in VeriTouch are:

- Relationship Manager Dashboard
- Branch Manager Dashboard
- Telesales Dashboard
- Customer Service Manager Dashboard
- Teller Dashboard
- Contact Center Agent Dashboard

Single View of Customer

Customer 360 provides a consolidated view of all customer products, cross-sell offers and opportunities, service requests, and channel interactions. A set of visual indicators are available to guide in handling interactions with a customer, showing whether the customer is delinquent, blacklisted, fraudulent, or has a high debt burden ratio.

Single View provides a timeline displaying details of the interactions that the customer has had through different channels, with the ability to capture new interactions and sentiments.



Contact Center Automation

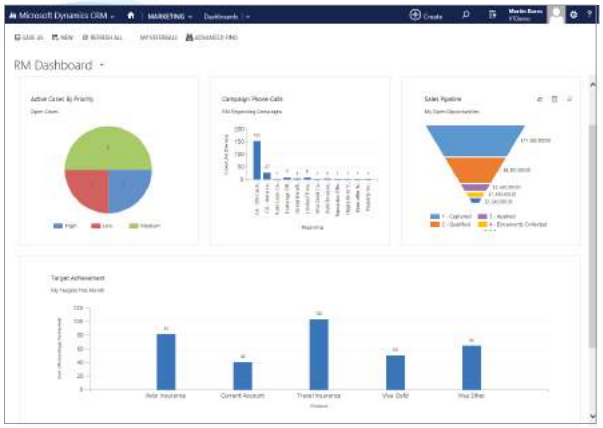
VeriTouch provides a complete agent desktop solution including the following features :

- Unified agent desktop, a single window solution for inquiries, maintenance and financial transactions.
- IVR / CTI integration and popping up the 360 view of the caller.
- Complaints and Service Requests capture.
- Lead capture and assignment to branches and Direct Sales Agents.
- Knowledge base.
- Customer interaction capture and call wrap-up.

Sales Management

Sales Management module automates the full sales cycle of different products from prospecting to fulfillment. Management can have complete visibility of the sales pipeline through various reports and dashboards. Sales Management module provides the following features:

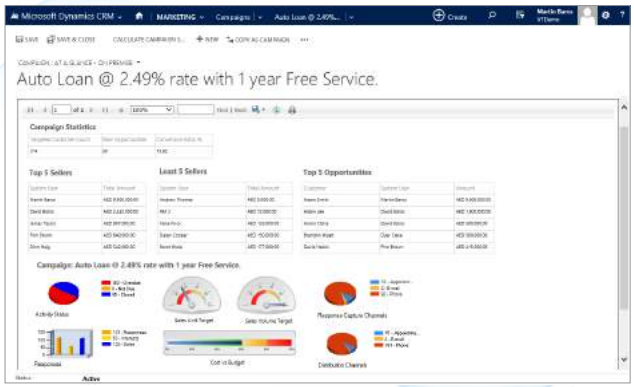
- Inbound and outbound sales processes.
- Prospect capturing, eligibility check, assignment and conversion.
- Opportunity capture, automatic assignment and routing.
- Multi-channel sales process from Direct Sales network to Branches.
- Service Level Agreements (SLA) and escalations on opportunities and sales activities.
- Configuration driven sales process steps and stages for any product.
- Sales pipeline dashboard and reports for monitoring individual and team performance.



Marketing Management

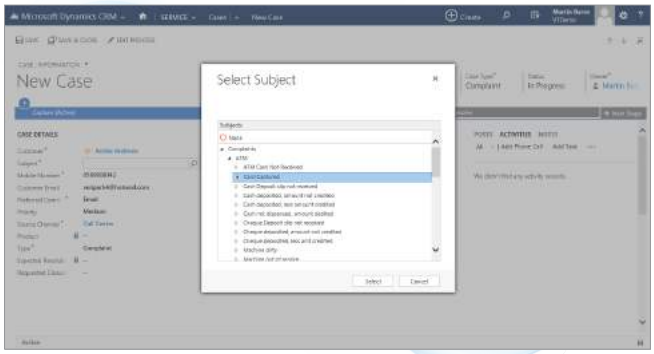
VeriTouch provides marketing automation for financial institutions by providing the complete cycle of campaign preparation, launching, distribution, and execution. VeriTouch offers the following features for marketing automation:

- Campaign creation, scheduling, and execution.
- Budget and expense tracking.
- Target list preparation by customer segmentation.
- Multi-channel campaigns including phone calls, e-mails, SMS, ATM, and Internet Banking banners, and other channels.
- Scripting support to provide personalized messages.
- Response tracking and automatic fulfillment.
- Campaign dashboards and reports to monitor the progress and effectiveness of campaigns in real-time including conversion rates.



Complaints Management

VeriTouch facilitates organizations to offer operational excellence by providing automated processes for the resolution of complaints and service requests. Once a complaint or a request is captured, it is automatically routed to relevant back office queues for fulfillment. Complaints and Service Request Management module offers the following features:



- Complaint and service request capture with structured entry of details.
- Automatic routing and assignment, segment, priority, and channel driven.
- Service Level Agreements (SLA) and escalations on complaints, requests and resolution activities.
- Configuration driven resolution process steps and stages for any type of complaint or service request.
- Monitoring dashboard and reports.

Key Features

Single View of Customer
- Customer products
- Customer profile
- All open complaints and service requests
- Offers & campaigns
- Ongoing applications
- Customer interaction capture and display

Complaints Management
- Structured complaints and SR capture
- Segment driven SLA
- N level escalations
- Automatic routing and assignment
- Case process configurator
- Case dashboard

Sales Management
- Prospect capture and assignment
- Opportunity capture and assignment
- Structured opportunity capture
- Sales process configurator
- Tele-sales / Direct sales queues
- Sales performance reporting

Marketing Automation
- Campaign management
- Campaign activity management
- Campaign dashboard
- Target Market List (TML) Management
- Phone, SMS, e-mail, web site banner, etc.

Customer Retention
- Schedule regular meetings
- Account Planning
- Generate follow up tasks
- Create, design and assign surveys

Contact Center
- IVR based authentication
- 360 degree customer view popup
- Tele-marketing
- Disposition / wrap up codes
- Unified agent desktop with single sign on

Admin Module
- Role and access management
- Approvals and referrals
- Queues and escalations
- Centralized auditing logs

Loyalty Management
- Loyalty campaigns
- Loyalty points management
- Merchants management
- Awards management
- Partner portal

Master Data Mgmt
- Individual & Corporate customer profile
- Customer information update
- New customer enrollment
- Customer account opening

About VeriPark

VeriPark is a software house specialized in providing software solutions to financial institutions. VeriPark is a Global ISV for Microsoft Dynamics CRM and has offices in Istanbul, Dubai, Riyadh, Cairo, London, Bahrain and Karachi.

VeriPark finance sector solution offerings

VeriBranch
Omni Channel Delivery Solution

- Internet Banking
- Call-Center
- Kiosk
- Branch Teller
- SMS Banking
- Mobile Banking

VeriTouch
CRM Solution for Banking and Insurance

- Contact Center
- 360 Degree Customer View
- Complaint Management
- Marketing
- New Customer Enrollment
- Sales Lead Capturing
- Sales Force Automation

VeriLoan
Loan Origination Solution

- Personal Loans
- Credit Card
- Auto Loans
- Mortgage Loans
- Servicing and Application Processes

Microsoft Dynamics CRM
Global ISV