



Purpose built specifically for the banking, capital markets, insurance and health industries, and powered by Microsoft Dynamics 365

Hitachi Solutions Engage Product Suite for Financial Services

Effectively managing customer relationships is key to growth and profitability in today's competitive landscape. That's why you've chosen Microsoft Dynamics 365. However, customizing your system to reflect your industry's unique roles, processes, and standards can be costly, time consuming, and hinder user adoption.

That's why we've developed the Engage product suite. Born from decades of experience and hundreds of implementations, Engage products take the reliability and ingenuity of the Microsoft Dynamics 365 platform and amplifies it with pre-built, out-of-the-box functionality specifically for financial services industries.

Whether your company is in insurance, health plans, banking, credit union, investment banking, private equity, or asset management, Engage products let you take your relationships to the next level while delivering on time and on budget.

Fact: According to Nucleus Research, companies using Industry Specific Applications found they could get 70-80% of their needs out of the box. Not only does this reduce time to go-live, but it also reduces initial consulting and customization costs by 40-60%.

Designed to extend and enhance the functionality of the Microsoft Cloud, Engage financial services products offer you the customized software needed to compete and win. You'll benefit from:

- ✓ Faster time to value
- ✓ Lower risk implementations
- ✓ More successful user adoption
- ✓ Automated workflow and industry-specific data & insights
- ✓ Enhanced sales & customer service

Engage Products for Financial Services

Engage for Insurance

Hitachi Solutions' Engage for Insurance provides insurance companies with a practical solution to effectively manage and foster profitable relationships across agencies, customers, brokers, and other partners. Our out-of-the-box insurance-specific modules and tools enable you to effectively manage all aspects of the insurance agency and customer lifecycle -- from relationship and engagement management to business development. Modules include DRM, DCM, producer productivity, policy integration, and risk management.

- Deliver personalized, contextual experiences
- Access real-time information
- Create tailored processes
- Provide customized dashboards

Engage for Health Plans

Hitachi Solutions' Engage for Health Plans gives health plan providers a holistic, customer centered view of the business that helps build strong, long-lasting relationships with customers. The suite of industry-specific modules allows you to speed and streamline the processes for group plan administration, DRM, group and individual sales management, member care, provider services, and integration with other business systems. It creates an end-to-end solution that helps you better track and manage relationships, convert leads to policy, and provide excellent service that helps win more business and improve customer loyalty.

- Identify the best prospects
- Advance opportunities in the pipeline
- Give everyone up-to-date views
- Foster stronger relationships

Engage for Private Equity

Hitachi Solutions' Engage for Private Equity helps you improve efficiency and intelligence throughout the investment lifecycle -- from finding and evaluating opportunities, raising funds and working to the deal, to managing investments and providing transparency to every stakeholder. Our industry-specific modules help you streamline the fundraising processes, connect the right investors with the right opportunities, and improve visibility into performance.

- Gain visibility and insight into your business connections and relationships -- including partners, investors, institutions, and legal and professional advisory
- Get the right people working together to communicate the right messages and share knowledge and best practices
- Find opportunities, build a strong pipeline, and close deals more effectively
- Better understand who the stakeholders and influencers are on every deal

Engage for Investment Banking

Hitachi Solutions' Engage for Investment Banking is for investment advisors to better understand member relationships in a way that positively affects business growth. The customized solution allows you to more easily track and manage contacts and relationships across multiple engagement roles including sponsors, clients, investors, and legal and professional advisory. Modules included are for relationship management, deal and engagement management, business development and marketing, dashboards and reporting, document and portal management, and integrations.

- Use business relationships to your advantage
- Make the most of your data to find viable new prospects
- Build the right team for every project and collaborate more effectively to close deals
- Access data in real time from any device, anywhere

Engage for Credit Unions

Hitachi Solutions' Engage for Credit Unions gives credit unions a holistic, member-centric view of their business information. With this 360-degree view of member data, you can better engage with members and the community and provide more responsive service. The approach provides fast delivery, lower costs, and high quality. The solution includes pre-built, industry-specific modules for member management, member service, and business development.

- Leverage a consolidated system specifically for credit unions
- Create better engagement and drive efficiency and productivity
- Offer products and services that are tailored to member needs
- Win customer loyalty and improve retention

Engage for Banking

Hitachi Solutions' Engage for Banking is tailored for the unique business needs of retail and commercial bankers and designed to give them a holistic, customer-centered centric view of the business and help build strong, long-lasting relationships with customers. Easy to implement and adopt, it also provides rapid return on investment. Modules include wealth management, relationship management, productivity, marketing and business development, service, and CRM.

- Quickly and easily understand your customers
- Offer customers the products they need
- Leverage a single centralized system and customized dashboards
- Win more business and increase customer retention

Engage for Asset Management

Hitachi Solutions Engage for Asset Management is designed to meet the unique needs of top-tier asset management firms, retail fund wholesalers, institutional sales teams, and relationship managers. Customized for the industry, it delivers a centralized, 360-degree view of your key financial advisor, client, consultant, custodian, and plan administrator relationships so you can have a consistent, customer-centric and holistic view of your business. The solution helps identify, manage, and track relationships between clients, pensions, endowments, foundations, defined contribution, sub-advisory, and financial intermediaries.

- Better profile and segment key relationships
- Increase visibility into contract management to enhance engagement
- Gain real-time visibility of opportunity by stage to better manage the opportunity life cycle
- Track and manage distribution lines and performance of dealers, brand offices, and individual reps
- Better manage pitch response and RFP and RFI process

Fact: Nucleus Research notes that companies using industry specific applications can lower ongoing administrative costs and save up to 25% of their total system admin cost.

Get Started. Request a Customized Demo.

Interested in learning more about Engage for Financial Services? Get a customized demo to see how you can re-invent your business solutions.



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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.

1

It starts with core technologies built on Microsoft Dynamics 365 so you can get up and running quickly

2

We extend that with our own industry modules that give you capabilities tailored to the needs of the financial services industry

3

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