



# Crowe CRM for Banking

Drive efficiency and profit in the new world of  
banking with Microsoft Dynamics™ 365

Microsoft  
Dynamics 365

Certified

Smart decisions. Lasting value.™



Banks are increasingly utilizing digital transformation strategies to build a customer-centric approach that better equips their relationship managers and staff with tools to improve the sales and service experiences.

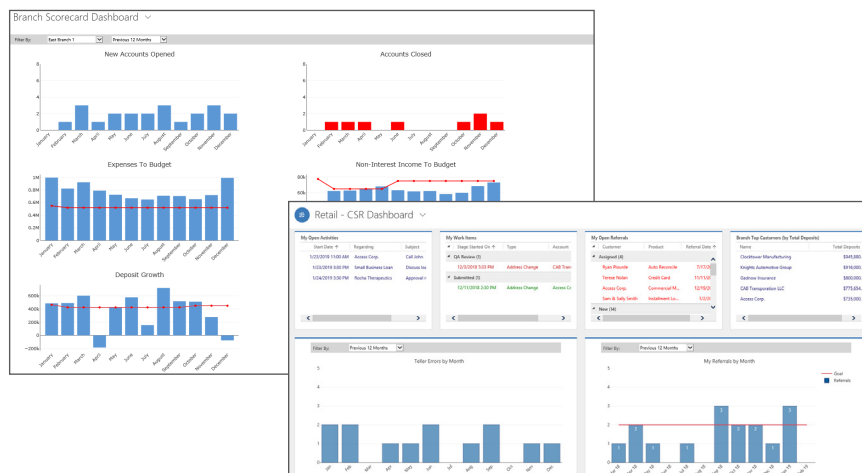
A well-defined and executed customer relationship management (CRM) strategy, with Microsoft Dynamics 365 at its center, helps banks focus on imperatives like increased customer acquisition, better customer engagement, and improved efficiency and costs.

## Digitally transform your bank with Dynamics 365

The familiar Dynamics 365 interface makes it easy for bank employees to do their best work with minimal training. Ease of integration with the products they are already using – Microsoft Office, Outlook™, and LinkedIn – enables more productivity and better service. Availability of advanced analytics like Power BI™ helps expand the reach of customer information to teams and executive decision-makers.

## Solution benefits

- **Build social networks. Get referral leads.** Using the tight integration with LinkedIn, reach and engage with prospects and customers by leveraging relevant LinkedIn profile content to increase engagement and build trust.
- **Acquire and close more new leads.** Conduct integrated, multichannel marketing campaigns with response and close-rate tracking. Provide scoring to focus on the most promising leads. Give relationship managers specific and timely sales process guides with automated workflows to promote best practices.
- **Increase operational efficiency.** Automate repetitive manual tasks, eliminate duplicate data entry, reduce queue time, and automate approval processes.
- **Improve customer loyalty.** Show your customers you know and care about their needs. Track customers centrally, provide better service, create nurture campaigns to strengthen ties, and more effectively promote products and services.
- **Optimize sales and cross-sell opportunities.** Comprehensive workflows, analytics, and sales management capabilities help track opportunities through the entire life cycle.
- **Improve service.** Empower bank staff with the tools and information needed to efficiently deliver high-quality, personalized service, for all interactions, across all channels.
- **Monitor your bank.** Track key performance indicators across the bank through rich dashboards and analytics.
- **Leverage your technology assets.** Dynamics 365 conveniently integrates with Outlook, Excel™, Word, and other existing Microsoft products and technologies – for quick user adoption and fast results.



Drive bank productivity, maximize sales, minimize costs, and deliver an exceptional and relevant customer experience.

Features	Benefits
 <b>360-degree view of the customer</b>	Integrate sales, marketing, and service functions, allowing relationship managers and service staff to access and share complete information across departments, product lines, channels, or intermediaries. Each member of the client service team has access to information that includes customer profile and history, relationships, and service records, which can increase customer confidence and improve bank productivity.
 <b>Employee productivity</b>	Collect and share deeper levels of customer knowledge to improve service levels at key points of the customer relationship, such as during predictable life events, and to enable customer-facing professionals to proactively schedule timely follow-up activities.
 <b>Workflow automation</b>	Automated alerts and customizable workflow can help a bank reduce the time required to resolve inquiries. Automated workflow can also streamline processes across functional areas, such as automating customer onboarding or qualifying a commercial line of credit.
 <b>Business intelligence</b>	Banks can use predictive analytics to understand and expand the customer lifetime value. Relationship managers can check overall account, loan, and churn rate to help them foster customer loyalty. Predicted lifetime events, such as buying a car, help relationship managers recommend the next best product or service.
 <b>Activity management</b>	Quickly capture call notes and schedule follow-up activities for efficient and timely follow-up. Efficient activity management increases revenue opportunity, accelerates lead conversion rates, and adopts a proactive approach to customer communication.
 <b>Marketing</b>	Identify target demographics and develop appropriate, targeted marketing campaigns and customer communications. Dynamics 365 helps banks prioritize leads, track referrals, monitor social insights, and record every customer and employee interaction in one place.
 <b>Network management</b>	Leverage built-in LinkedIn and other social media integrations to build network connections, drive new referral leads, and create leads and contacts in CRM software without retyping.
 <b>Lead management</b>	Automate your lead management and sales qualification process in one central location. Convert incoming leads from email messages and use guided dialogues to streamline the qualification process.
 <b>Compliance management</b>	Incorporate regulatory and compliance changes to help promote product and procedural compliance.
 <b>Document management</b>	Store documents against any record in Dynamics 365 and realize robust and secure document management capabilities across the bank.
 <b>Familiar look and feel</b>	Crowe CRM for Banking provides a familiar, easy-to-use interface, enabling your bank to deliver fast, effective service that builds trust-based relationships. Enhance communications using familiar tools, such as Microsoft Outlook, Excel, and Word, helping to increase user adoption and lower the cost of learning.



## Learn more

For more information about **Crowe CRM for Banking**, contact us at +1 877 600 2253 or visit [www.crowe.com/crm](http://www.crowe.com/crm).

## Crowe CRM services

At Crowe, our mission is to help any organization streamline their business operations and increase business success with the Microsoft Dynamics 365 platform.

### **Crowe knows the banking industry**

Crowe works with 1,800 financial services organizations across the country, including more than two-thirds of the top 100 U.S. banks. We draw on our wide-ranging experience, banking expertise, and independent perspective to help our clients gain new insights into industry best practices, while offering practical solutions to address your specific needs to help you achieve higher performance.

### **Our experience is delivering CRM project success**

We have a long history of implementing CRM technology, from the inception of contact management applications through the evolution to sales force automation, and ultimately CRM systems. Our logical CRM project implementation methodology is proven and focused on project success.

### **We know Microsoft Dynamics 365**

At Crowe, we are focused on Microsoft Dynamics 365 and the Microsoft technology platform. Our involvement with Microsoft CRM dates back to the first release in 2003 and continues through its evolution into the powerful CRM platform it is today. The flexibility of the platform, familiar user interface, interoperability with the Microsoft Office platform, including Outlook, and its top-flight functionality make it a smart investment choice for any organization looking to implement a CRM technology strategy.

### **Focused on your success**

Crowe strengths are our people and their personal commitment to each client engagement. Our logical approach, the quality of our effort, and the seriousness and professionalism we bring to the table have been the keys to our accomplishments. We measure our success by our clients' success.

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