
Loyalty Management

VERTICAL & HORIZONTAL SOLUTIONS for MICROSOFT DYNAMICS 365



What We Do?

we can help you take your business **to the next level**

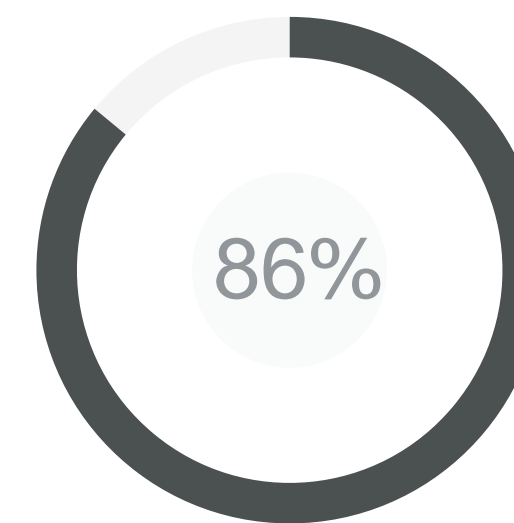
We offer

- ✓ Extensive expertise in digital transformation
- ✓ Business consulting & reengineering services
- ✓ Technology-driven business improvement using the latest cutting edge innovation trends
- ✓ Industry specific modules & added functionalities
- ✓ Modules implemented individually or as a core management solution
- ✓ Adoption of the world's best practices to extend the standard Microsoft Dynamics logic
- ✓ Partnership on the way to full digital transformation

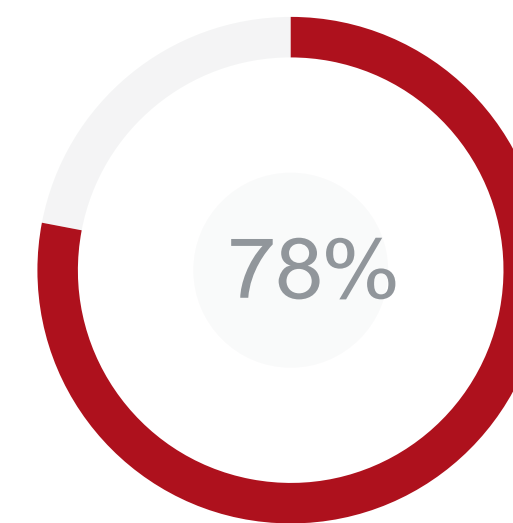
More about Us

COREFIN is a family of software solutions developed by the team of PIAS Business Solutions Ltd with the help of partners and Industry experts. Our solutions are based on Microsoft Dynamics 365, a globally recognized family of software solutions and leading technology platform.

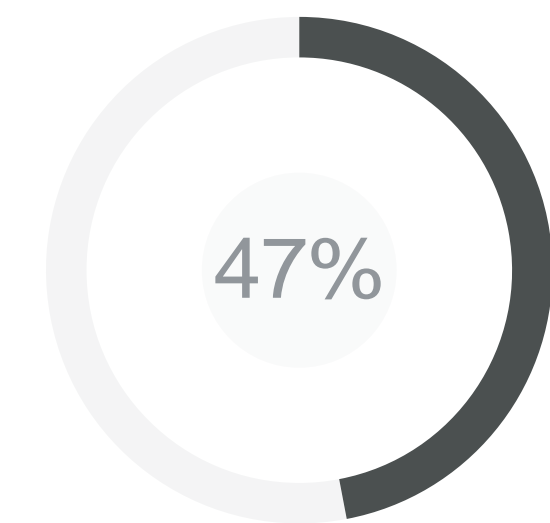
We have more than 15 years of experience and valuable international references in creating out-of-the-box customized solutions that digitalize your business and improve your performance significantly!



Increase in revenue
reported by SMIs



Increase in customer
satisfaction reported by
sales teams



Improved customer
retention upon
software adoption

Business Benefits

we can help you take your business **to the next level**



1

Systemize and streamline business processes to make them more efficient, easy to track and quick to change. **Automate** them via alerts and staged workflows to eliminate paper-based processes and minimize delays

2

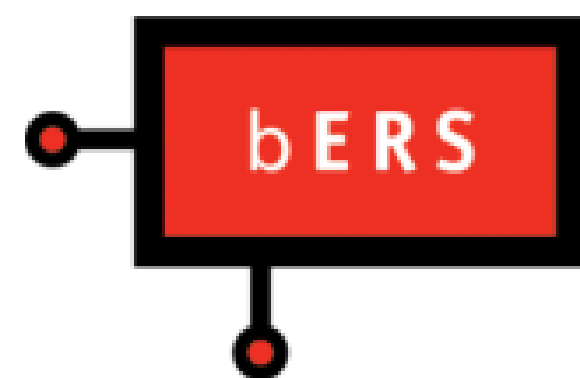
Rely on up-to-date and organized Information. Big Data is centralized, easy to manipulate and analyze. **Security** roles allow control over sensitive information and users' activities

3

Build profitable long-term relationships with clients and other stakeholders. Complete history of interactions with clients helps better offering and service. **Analysis** and customer profiling unveils up-sell and cross-sell opportunities

4

Enable Flexibility & Growth. Quick and sophisticated analytical capabilities show business performance in real time. **Easy** to adapt and scalable technology enables business growth to be quick and hassle-free

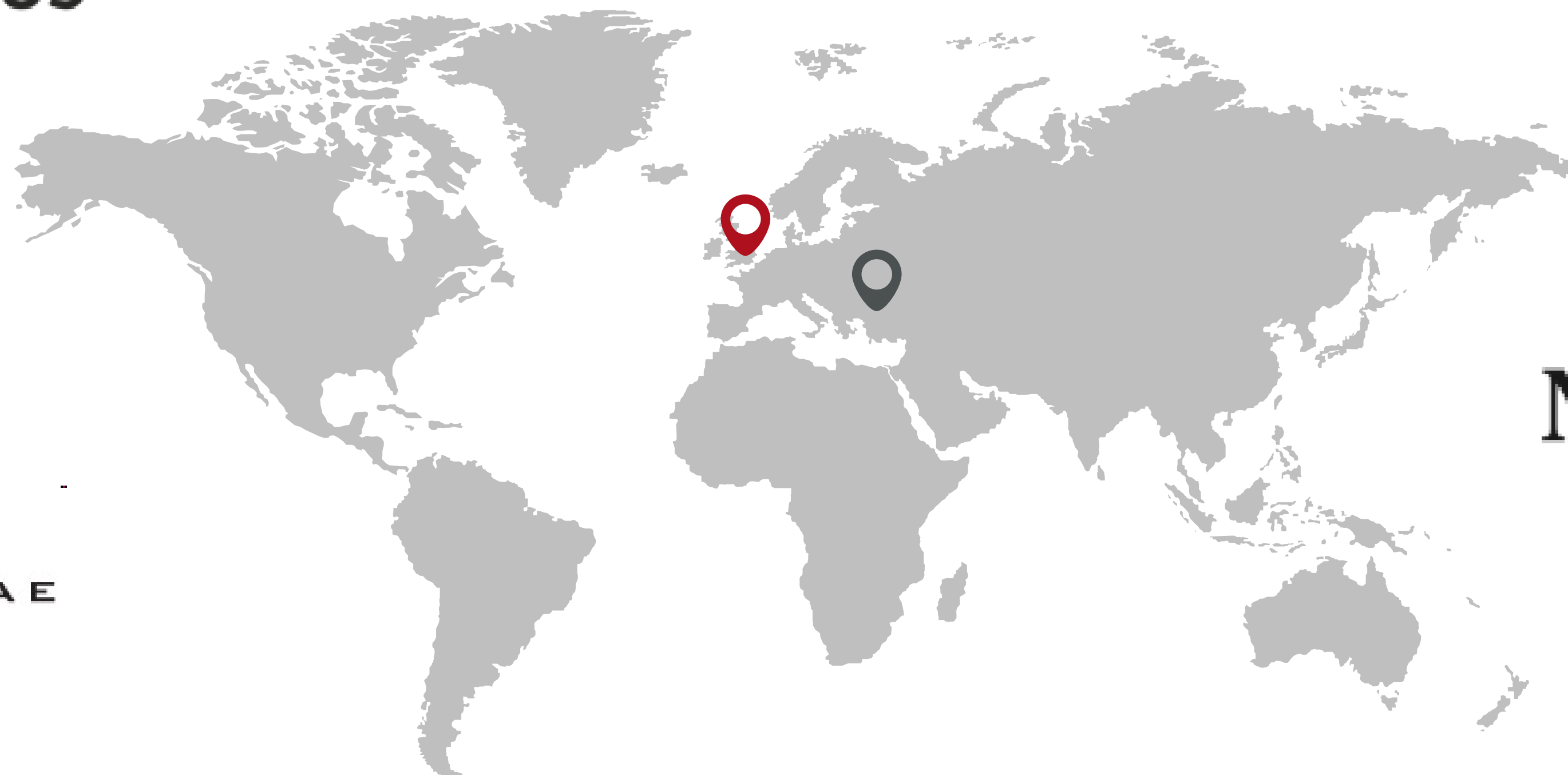


They trust us

we can help you take your business to the next level



INGENIOUS



COREFIN Vertical Solutions

in the heart of the fully integrated & digital company



Self-Service Portal

- ✓ Customer Transactions
- ✓ Collaboration Tool
- ✓ Easy to use for all stakeholders
- ✓ Role-based customized functionality
- ✓ Mobile friendly & responsive design



Web Self-Service Portals

Office & SharePoint

Document Management

- ✓ Mail Merge
- ✓ Document Version History
- ✓ Single Info Source
- ✓ E-signature



ERP & BI

- ✓ Accounting & Financial Analysis
- ✓ Bespoke Reporting
- ✓ KPIs

Power BI & Microsoft Dynamics NAV

COREFIN Microsoft Dynamics XRM



Vertical Solutions

- ✓ Insurance & Brokerage
- ✓ Banking Solutions
- ✓ Property Management
- ✓ Telecom & Data Center

Various Horizontal Solutions

Loyalty Management | Solution





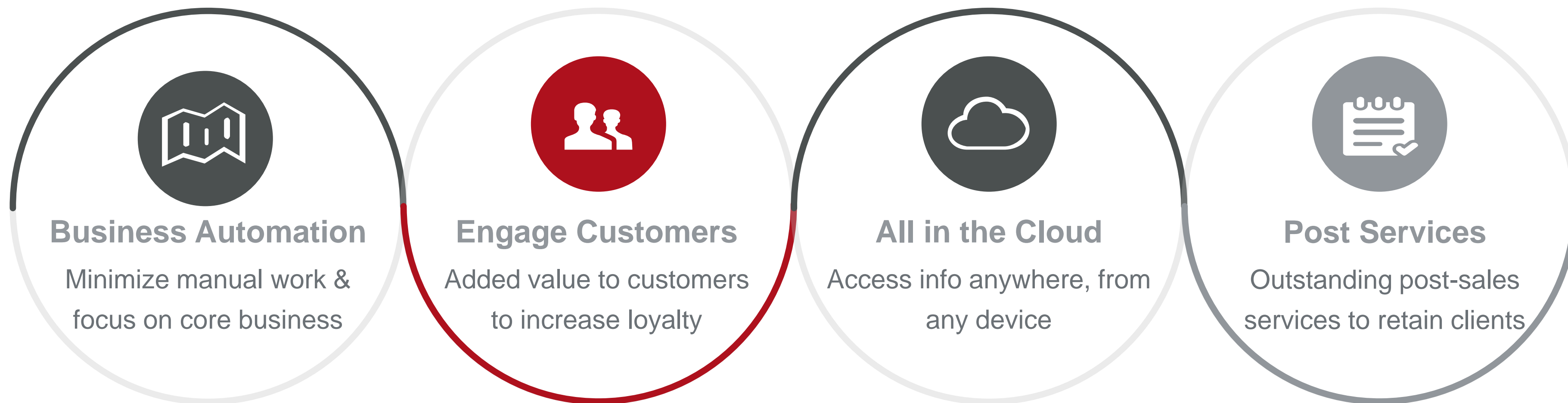
COREFIN Loyalty Management

COREFIN Loyalty Management is a horizontal solution based on Microsoft Dynamics 365 and building upon its standard functionalities. With the help of our integrated solution, you can track your customer behavior, spot trends and respond with appropriate business actions.



We Add Value

Empower all stakeholders



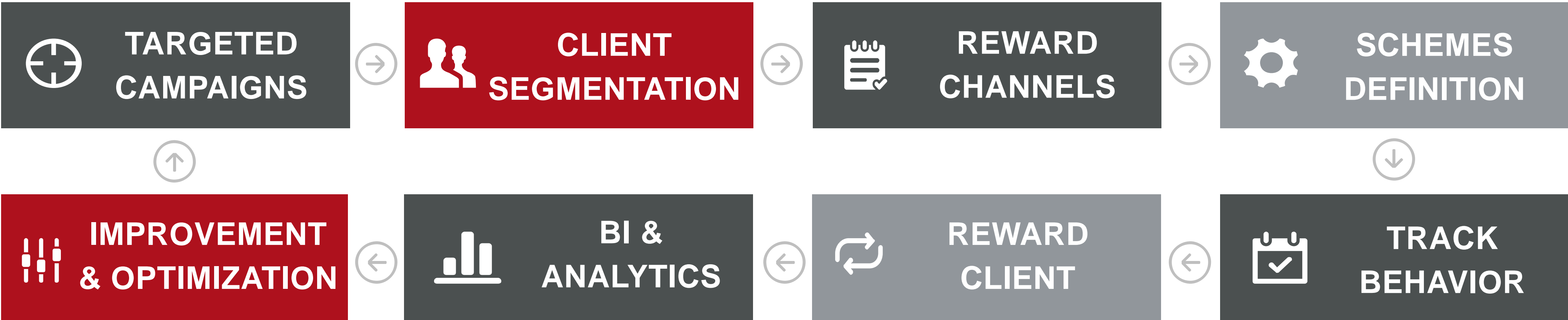
WHAT WE CAN OFFER

We can automate and digitalize your whole business from the initial request entry to signing a contract and related post-services. Thus, you can minimize your manual and repetitive work so that you can spend more time and engage with the client! Accessible anywhere, you have 24/7 access to key info and the flexibility to react quickly and offer the best service for higher customer satisfaction!

Solution Overview

End-to-end Life Cycle Management

Our COREFIN Loyalty Management horizontal solution is an add-on to Dynamics 365: you can select the reward channels and client behavior, track trends as well as the impact of executed marketing activities. The flexibility of our solution gives you all the needed tools to react and adapt quickly to changing business requirements.



The Solution in details

we can help you take your business **to the next level**

TARGETED CAMPAIGNS



- Quick client segmentation in various marketing lists
- Highly personalized marketing campaigns with just a few clicks
- Campaigns execution across multiple channels (email, sms, etc.)
- Advanced Mail Tracking functionality to analyze campaign performance & plan further sub-campaigns

CLIENT SEGMENTATION



- Various types of cardholder accounts - individual, corporate, family accounts, silver, gold, platinum, staff discounts and more
- Opportunity for loyalty programmes with broader range of stakeholders - shops, partners, suppliers
- Comprehensive cardholder profiling and targeting

REWARD CHANNELS



- Loyalty Cards, Discount Card and Vouchers
- Possibility to develop customer portals with personalized offers, games, social media integration and more
- Possibility to show customized offers on the POS terminal
- Integration with POS Terminals

SCHEMES DEFINITION



- Reward accumulation and redemption rules definition (e.g. rewards based on products bought, time and place of purchase, minimum spend amounts, reward expiration)
- Loyalty points expiry dates
- Define LPs accrual on specific product, group of products or for specific shops

The Solution in details

we can help you take your business **to the next level**

TRACK BEHAVIOUR



- Track most preferred products and services as well as channels of sales: online or onsite, most preferred locations, daytime, profile of a customer per product group
- Track the client reaction to different campaigns and marketing strategies

REWARD CLIENT



- Offered targeted products groups and promotions
- Possibility to mix and match offers for groups of shops or products (double points if you buy before Friday)
- Central customer management system that allows elaborate filtering and segmentation

BI & ANALYTICS



- Dashboards & reports
- Performance management and profitability reporting
- Flexible Ad hoc and scheduled reports and dashboards
- Analysis of the total points that are not redeemed at any given moment for financial planning and tracking

IMPROVEMENT & OPTIMIZATION



- Focus on most profitable products and services as well as most efficient campaigns
- Increase inefficiencies and identify bottlenecks
- Apply business reengineering
- *"If you can't measure it, you can't improve it."*

Peter Drucker

Mobile Web Self-Service Portal

Have access to your info **anytime anywhere**



Role Based

Various stakeholders can have access to different set of info and operations to execute



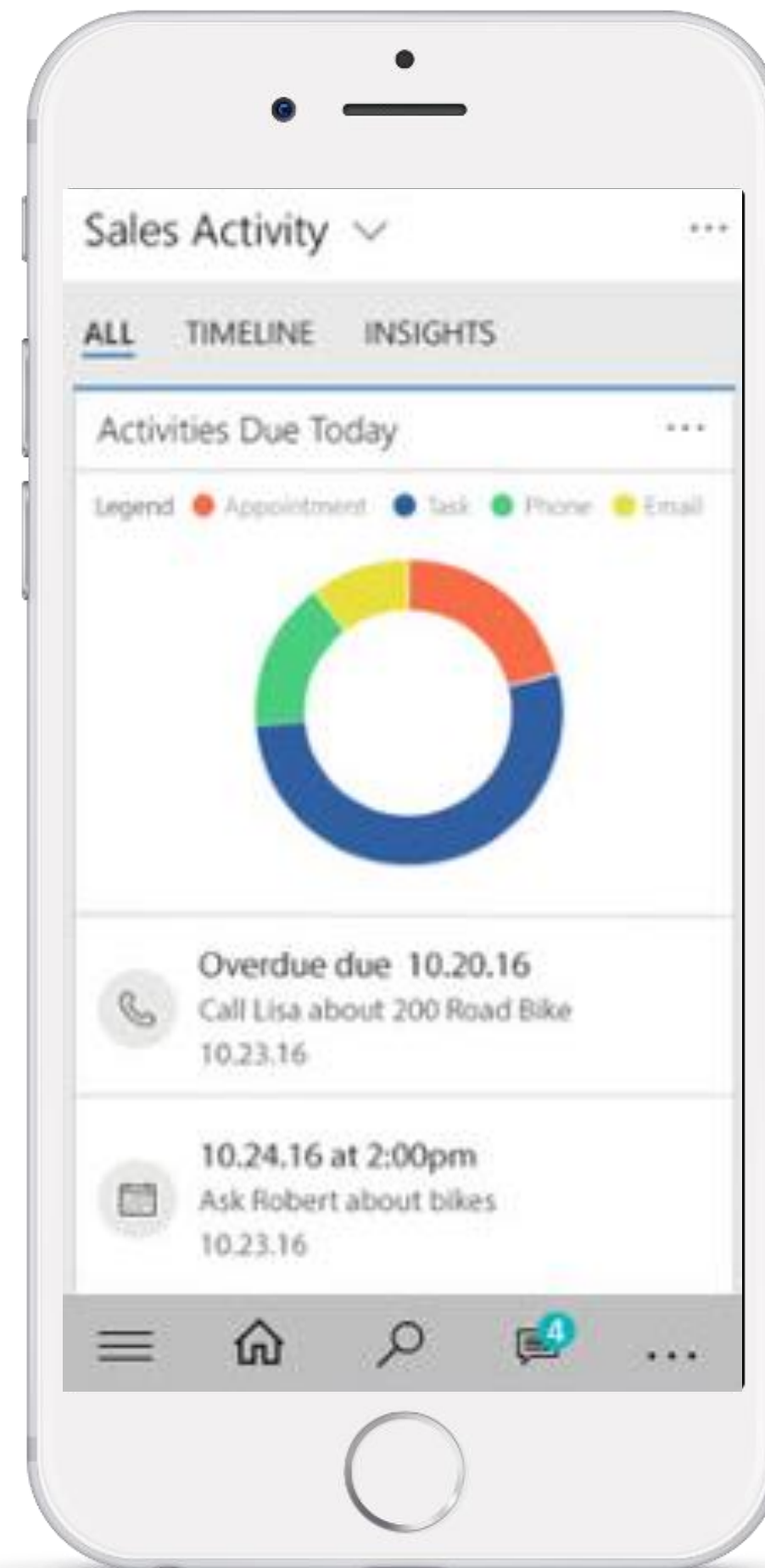
Easy to Use

Very easy to navigate, manage and use; intuitive mobile friendly interface



User Friendly

Highly personalized interactive service to engage all stakeholders



Available on any device

Fast, easy and convenient to use on all mobile device



Customer Involvement

Customers can be notified, receive personalized info, track their history and all transactions



Efficiency

Minimizes the time for transaction completion, thus boosting the ability to increase productivity and profit



Power BI & Reporting

Analyze performance and spot problem areas **from the beginning**



FLEXIBLE BUSINESS ANALYTICS IN REAL TIME

- ✓ With Power BI you can monitor important data from across your organization and from all of the apps you rely on
- ✓ Create stunning interactive reports: tools to transform, analyze, and visualize data; share reports in seconds with your organization
- ✓ Consistent analysis across your organization: build robust, reusable models over your data to provide consistency across reporting and analysis in your organization
- ✓ Easy to use on all mobile devices
- ✓ 3D property maps with real-time analytics
- ✓ Ad hoc or customized analysis

PROFIT FROM THE MARKET LEADER AMONG THE ANALYTICAL PLATFORMS

Read more [Here](#)



COREFIN Solutions

Enable analytics and **increases productivity**



ANALYTICS

Microsoft Dynamics 365 platform has very easy to use yet very powerful analytical and reporting capabilities which include:

- ✓ Reporting on all recorded parameters and pieces of data
- ✓ Set and track KPIs (key performance indicators)
- ✓ Interactive dashboards and graphs
- ✓ Ad hoc reports (advanced find) or customized reports
- ✓ Reports visualized in Google Maps to see spread of data

PRODUCTIVITY

Microsoft Dynamics CRM platform is designed to increase employee productivity and enable better collaboration between teams and individuals via:

- ✓ Easy to set workflows enable automation and speed of processes
- ✓ Automatic alerts & reminders; activity and tasks management
- ✓ Intuitive elimination of duplications
- ✓ Easy to find, share and use information across departments
- ✓ Seamless tracking of communications between Outlook and COREFIN

Why COREFIN

we can help you take your business **to the next level**

Business Logic

Based on **Microsoft Dynamics XRM**

- ✓ Used by 18,000 companies globally with more than 1,000,000 users, in more than 80 countries
- ✓ Named market leader by Gartner and Forrester
- ✓ Native integration with Outlook (contacts, tasks, calendar and notes) and other Microsoft products
- ✓ Native integration with the leader among the analytical platforms: POWER BI!
- ✓ Business logic developed according to the best global practices
- ✓ Supports multiple languages and currency so that you can grow with ease
- ✓ Very competitive pricing

Technology

Based on **Microsoft Dynamics 365 top technology**

- ✓ Multiple deployment options: in the cloud or on premise
- ✓ SOA/Web based platform allows easy adaptation and integration with existing IT solutions
- ✓ Easy to adapt to your specific business needs
- ✓ Scalable to manage growing number of users and operations
- ✓ Works via the Internet (Internet Explorer), as well as offline
- ✓ Enhanced security and data protection via user specific security access

Experience

COREFIN Experience

- ✓ We are on your side: our team of experienced experts will provide bespoke consulting
- ✓ Our cross-industry and multi-national experience will open various insights for you
- ✓ We can help you digitalize your whole business so you can focus on what you do best
- ✓ Constant innovation & adopting the latest tech trends



Why Us?



THANK YOU FOR YOUR ATTENTION!

WHERE TO FIND US

4 Addison Avenue, Holland Park
London, United Kingdom

EMAIL



contact@core-fin.com

TELEPHONE



+44 (0) 208 133 99 99

