

VeriTouch Banking CRM Solution

Microsoft
Dynamics 365



Certified

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
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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.

The screenshot displays the VeriTouch CRM interface for a customer named Archie Andrews. The interface is divided into several sections: Overview, Products, Sales & Marketing, Servicing, Relationship, and Profile. The Overview section shows a summary of the customer's status and key metrics. The Products section lists various products offered to the customer, including Current Account, Personal Finance, and Visa Gold. The Sales & Marketing section displays offers and opportunities for the customer. The Servicing section shows the customer's interaction history across different channels. The Relationship section provides details about the customer's relationship with the bank. The Profile section contains personal information and contact details. A timeline at the bottom of the interface shows the sequence of interactions, including calls, branches, and social media interactions.



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.

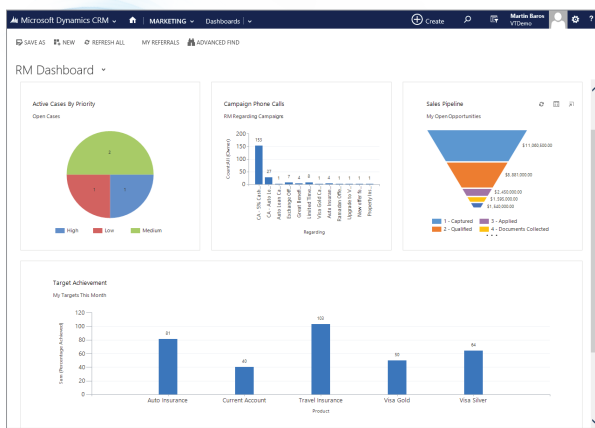




Sales Management

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:

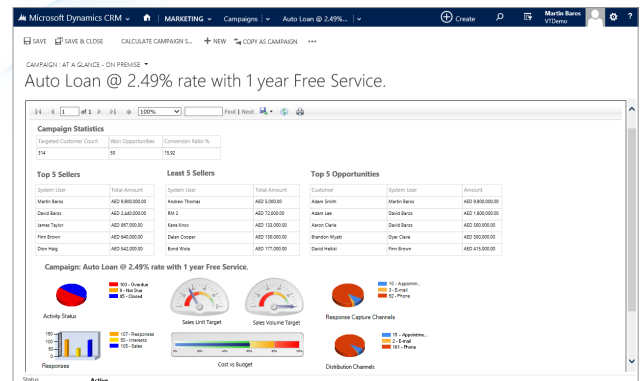
- Inbound and outbound sales processes.
- Prospect capturing, eligibility check, assignment and conversion.
- Opportunity capture, automatic assignment and routing.
- Multi-channel sales process from Direct Sales network to Branches.
- Service Level Agreements (SLA) and escalations on opportunities and 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

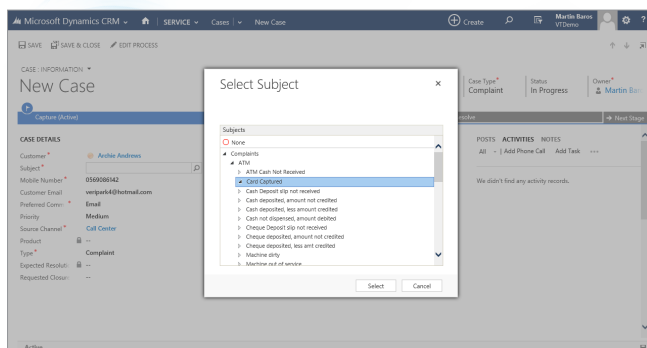
VeriTouch provides marketing automation for financial institutions by providing the complete cycle of campaign preparation, launching, distribution, and execution. VeriTouch offers the following features for marketing automation:

- 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 global solutions provider which enables businesses to become digital leaders with its' Intelligent Customer Experience suite. With its main offices located in United States, United Kingdom, Europe, Asia, Africa and the Middle East, VeriPark is helping businesses to enhance their customer acquisition, retention and cross-sell capabilities by providing proven, secure and scalable Customer Relationship Management, Omni-Channel Transaction Management, Branch Automation, Loan Origination, Next Best Action (leverages the power of Azure machine learning) and Customer Insights solutions. VeriPark works collaboratively with clients to develop innovative technology strategies and solutions, which touches millions of people every day, and brings the promise of digital transformation to life.

With the help of VeriPark's end-to-end seamless customer experience solutions, business get chance to empower more engaging interactions with its customers or partners by capturing their needs, owning personalized insights, and placing customers at the core of their digital transformation and innovation.

VeriPark finance sector solution offerings

VeriChannel

Omni Channel Experience



- Internet Banking
- Mobile Banking
- Contact Center Banking
- Mobile Wallet
- Digital Onboarding
- Branchless Banking
- Chatbot

VeriBranch

Branch Automation



- Teller
- Seller
- Advisor
- Branch of the Future
- Unified Front End
- Digital Branch
- Signature Verification

VeriTouch

Acquisition, Retention, Cross Sell



- 360 / 720 Degree Customer View
- Next Best Action
- Customer Insight
- Marketing & Campaign Management
- Loyalty & Retention
- Complaints & Request Management
- New Customer Enrollment

VeriLoan

Loan Origination Solution



- Retail Auto Loans
- Retail Personal Loans
- Retail Mortgage
- Retail Credit Cards
- Corporate Credit Proposal
- Scoring
- Deviations & Approvals

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ISV of the Year