

Techvista CRM Banking Catalyst

 **BANKCA** | CRM Banking Catalyst



Banks struggle with process automation, centralized management and planning



Challenges

- Time-consuming manual and distributed task management
 - Lack of internal coordination and omnichannel experience
 - Complex regulatory and business scenarios
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- Inaccurate data and process delays
 - Slow, error-prone task management
 - Inconsistent, complex customer experience



Ideal Solution

- Effective centralized management
 - Transparent task assignment
 - Real-time analysis of customer behavior
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- Effective management, transparency, and customer analysis improve efficiency and enhance banks' customer experience
 - Process automation saves time and money



Desired Outcomes

- Superior omnichannel customer experience and increased operational efficiency
 - Banks are adopting digital CRM solutions to enhance business management and planning
 - Less rework, fewer missed deadlines, and real-time business insights
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- Stronger client relationships
 - Less time spent on manual tasks
 - Data-drive insights drive future business strategy



Techvista CRM Banking Catalyst



Effectively manage leads, onboarding, origination, risk assessment, and compliance

Leads, Onboarding & Origination

- Simplified lead generation and transparent distribution assignment
- Easy customer onboarding and personalized product offering

Collaboration & Management

- Manage contracts, product portfolio, documents, printing & delivery, risk rating & scoring, and credit & limit
- Collaboration, approval, and know your customer (KYC) workflows and task automation

Administration & Reporting

- Manage performance, customize workflows, schedule tasks, and receive automatic alerts
- Model relationships, track SLAs, and receive a holistic, 360° view of clients for real-time, data-drive decision-making

Techvista CRM for Banking Solution + Microsoft Dynamics 365



BANKCA, built on the scalable Dynamics 365 platform, manages business operations, onboarding, lead assignment, and task workflows, and provides insights that enable real-time decision-making

Solution Alignment

Scalability and Performance

- Processes thousands of requests without slowdowns or downtime
- Integrates key business systems



Highly Customizable

- Provides powerful, flexible tools to customize views, reports, forms, and workflows



Agile Communication

- Presents intuitive and detail-rich job status summaries and reports
- Enhances enterprise-wide decision-making





Simply your Financial Service Banking CRM
with TechVista BANKCA

Ask Question via : info@techvistasystems.com