



CRM Banking Catalyst

Lead management, regulatory compliance, and real-time centralized planning

Banking customers demand ease of access and use. Banks must modernize business operations to address customer expectations and improve process efficiency.

What is CRM Banking Catalyst?

A fully compliant solution for omnichannel lead management, onboarding, and loan processing. Smart workflows and rules enable intelligent decision-making. Random lead assignment, automated risk assessment, and client scoring improve transparency. Personalized products, communication, and scheduling deliver an outstanding customer experience.



Why customers use CRM Banking Catalyst

- Automates business processes according to regulatory requirements
- Improves transparency using random lead assignment
- Increases the productivity of your service and support teams
- Ensures procedural precision and completeness using multistage onboarding, loan processing workflows, and checklists

Capitalizing Sales

- Supports multiple types of account onboarding and loan origination
- Omnichannel lead management
- Enriched dynamic forms capture "know your customer" (KYC) information

Simple yet comprehensive solution for multifaceted banking scenarios

Service Automation

- Automatic risk assessment and scoring
- GCC-localized regulatory and security compliance (credit rating, FATCA, etc.)
- Collateral management analysis

Efficiently manage workloads, task distribution, and workforce planning

Actionable Analytics

- Client credit history and Central Bank integration
- Effective agent management with SLA-based performance review
- Document and history management

A holistic, 360° view of clients, agents, and services