

Microsoft Dynamics CRM



Enable your **business** to maintain
the **competitive edge**
In today's **dynamic** market.

Welcome to EJADA
The Leading IT Solutions & Services Company in MENA

CRM Main Subject Areas



Customer 360° View

Customer centric view by consolidating all customer information in to one application (including customer demographics, locations, contacts, products/services, credit profile, transactions, interactions history, etc.



Customer Services & Complaints Management

Services Management module will leverage organizations' services standards and let their clients touch a dramatic enhancements in the provided services. This module support managing clients' service requests/inquiries/complaints from initiation to resolution. Up to 100 banking Service request Catalogue.



Call Center Activities Management

Support agents manage their day-to-day activities like place, receive, conference, and transfer telephone calls, fully integrated with the CRM

CRM Main Subject Areas



Marketing & Campaign Management

Managing campaign planning, multi Stage Campaign, Targeted customers segmentation, Campaign Delivery (Call Center, SMS, EMAIL, Direct mailer, Internet, etc.), Response Management and Campaign effectiveness Analysis. Segmentation capabilities will support building a logical layer over the existing data mart.



Sales Management

Sales & opportunity management processes help our clients increasing their revenue by better targeting their customers and enhancing their up-selling/cross selling.



Incentive Compensation

This module will allow your organization to connect sales incentives to business objectives to motivate workers (sales reps), 3rd party representatives, supervisors and levels of managements through incentive insight



DATA & ADVANCED ANALYTICS

Banks leveraging big data and advanced analytics to predict what customers want and better understand risk are finding new ways to drive revenue and control costs.

CRM Main Subject Areas



Social Relationship Management

Social media product automatically harvests, stores, analyzes & integrates unstructured content from social media based on business specifications.
Business chooses the keywords you would like to harvest and analyze, such as brands and/or products, competitors or topics.



Loyalty Management Module

Enables your organization to consistently deliver positive experience to members across channels & at point of interactions through the speed and precision of designing & executing targeted promotions.
In addition, it will help you to manage your loyalty program partners.



Customer Self-Services (eService & e-Sales) Channels

Enable clients to contact through non-traditional e-Channels (smartphones, web portal site, SMS, USSD, etc.) for submitting service requests, complaints and inquire on their pending requests.
This will leverage organization's image as using state-of-the art technologies to facilitate its clients communications with an easy and very reachable channels.



Loan Origination

A simplistic but yet a powerful efficient solution for the loan origination system to manage the credit/ loan application creation as well as approvals and deviations. Also calculating the eligible amount through integration with the decision engine and external systems like SIMAH. And finally, creating the loan in Loan Management system via integration once the application is approved.

CRM Footprint for Banking

Microsoft AppSource

Office 365

Power BI

**Cortana
Intelligence**

Azure IoT

Dynamics 365
(Sales, Customer
Service, Field
Service, Operations,
Financials,
Marketing and
Project Service
Automation)

**Third Party
Business
Applications**

Application platform

(PowerApps, Power BI Embedded, Flow, Common Data Model, Common Data Service)

Campaign Management Features



Marketing Campaign Data Mart by bringing customer information & relevant calculated attributes

Implementation of campaigns (adv, event, direct marketing,...) & views to capture information,

Implementation of business processes for creating or converting responses to leads or opportunities.

Approval workflow.

Monitoring of campaign activities through its life cycle.

Implementation of the required View and dashboards to track the campaign effectiveness and efficiency

Integration with the following source systems to feed and interact with MS marketing campaign (Email & SMS)

Sales Management Introduction

Business Objects:

Automate all sales business processes and reporting using Microsoft Dynamics Lead Management module to be used for Sales division to support sales processes from acquiring a new lead till lead closure.

Solution Components:

Building Retail Sales Management Cycle (Existing Clients & New Prospects):

- Lead Capturing through Different Channels
- Lead Qualifications and Assignment to different channels
- Lead Closures / Reporting and Monitoring

Sales Management for Private banking /Affluent:

- RMs to manage Leads for clients under their portfolio.
- Management of Leads distribution based on different criteria
- Lead closure by RMs

Customer Services & Complaints Management

Business Objects:

Empower users, call center agents as well as branches' users, to address the customer requests and complaints in a timely manner and in an efficient way. The module supports the First Call Resolution (FCR) initiative serving the customer in the first interaction.

Solution Components:

Services Module:

- Introducing 100+ Banking services via integration with backend systems
- Extendable service catalogue that addresses the most frequent banking requests

Complaint Management:

- Manage customer Complaints
- Manage end-to-end Workflows & actors
- Data differs from type to type based on request nature.
- SLA & Escalation management
- Up to 50+ Complaints Types for banking

Service Catalog

Credit Card – Activation / TPIN Re-Set
Credit Card – Blocking (Manual Process)
Credit Card – Blocking (Through IVR)
Credit Card – Credit Shield Maintenance Request
Credit Card – Delivery Deviation / Delegation Deviation
Credit Card – Home / Business (same employer) Address / Contact Number Change
Credit Card – Mailing Address Swap
Credit Card – Online Balance Inquiry
Credit Card – Replacement Request
Credit Card – Reversal / Waiver
Credit Card – Reward Points Vouchers
Credit Card – Statement Printing
Credit Card – Temporary Block Release
Credit Card – Temporary Limit Increase (After Working Hours)
Credit Card – Temporary Limit Increase (During Working Hours)
Credit Card – Travel Notification
Credit Card – Delegation Request
Credit Card – Early Renewal Request
Inquiry Service -
Master Card Activation / TPIN Re-Set
Master Card Blocking
Online Password Re-Set / Unlock
Online Service Activation - Activate using internet banking for certain customer account
Personal Addresses Inquiry
Returned Cards
Returned CC Reward Points Vouchers
Returned Credit Card Statement
Reward Points
SMS Un-subscription Process
Call Center Financial Services - Transfer to Own Account
Call Center Financial Services - Transfer to Own Credit Card
Call Center Financial Services - Transfer to Other Account
Call Center Financial Services - Transfer to Other Credit Card

Service Catalog

Online Service Inquiry - Get Customer Accounts
Online Service Inquiry - Full Balance Enquiry Request
Online Service Inquiry - Mini Statement Enquiry Request
Online Service Inquiry - TD Balance Enquiry Request
Online Service Inquiry - Loan Balance Enquiry Request
Online Service Inquiry - Credit Card Full Balance Enquiry
Online Service Inquiry - Credit Card Movement Enquiry
Online Service Inquiry - Get Customer Information
Online Service - Activate/Reset Customer's TPIN
Online Service - Unlock Customer
Online Service - Activate / Reset Credit Card TPIN
Online Service - Unlock Credit Card
Complain Management - Capture complaint details and manage resolution within SLA (Service Level Agreement) with appropriate departments
Installment Request Processing
Payless Requests upon Customer Request
Accounts Balance Inquiry
OD Inquiry
Accounts Contact information Update
SMS update for Accounts
Accounts transaction Inquiry
Credit card Limit Enhancements
Utility Activation / adding / deleting
Beneficiary Activation
Access level updates
Customer call back requests to branches
Loan installments postponements requests
Customer Account details inquiry
Customer Account information inquiry
Credit customer profile
Loan disbursement
Loan Schedule
Loan settlement
Deferment/Reversal of loan installment(s)

Banking CRM Footprint

- Product Definition
- Product policies & Eligibility
- Product bundles
- Product Promotions
- Product pricing

1- Product Modeling & Pricing

- Customer profile & 360 management
- Customer preferences
- Customer products /services/ applications
- Customer interactions history
- Relationship Management
- Household Management

2- Retail Customers Data Management

- Customer profile & 360 management
- Customer preferences
- Customer Hierarchies & relationships
- Customer products/services/applications
- Credit Applications Approval Cycle
- Customer interactions history
- Relationship Management & Call Reports

3- Corporate Customers Data Management

- Lead Management
- Cross selling/up-selling
- Opportunity Management
- Sales Quotation & offering
- Complex Product Recommendations/configuration & offering customization
- Price negotiations & Price waterfall
- Sales Proposals
- Sales Contacts & contract entitlements
- Enterprise selling processing (ESP) for large accounts

4- Sales Force Automation

Banking CRM Footprint

- Event Management
- Campaign Management
- Loyalty Management
- Churn analysis
- List Management

5 - Campaign Management

- Customer/Account Acquisition
- Customer scoring against black list & credit Bureau
- Integration with back end systems (Core banking, loan management, credit card systems)

6- Credit Origination/ Account Opening

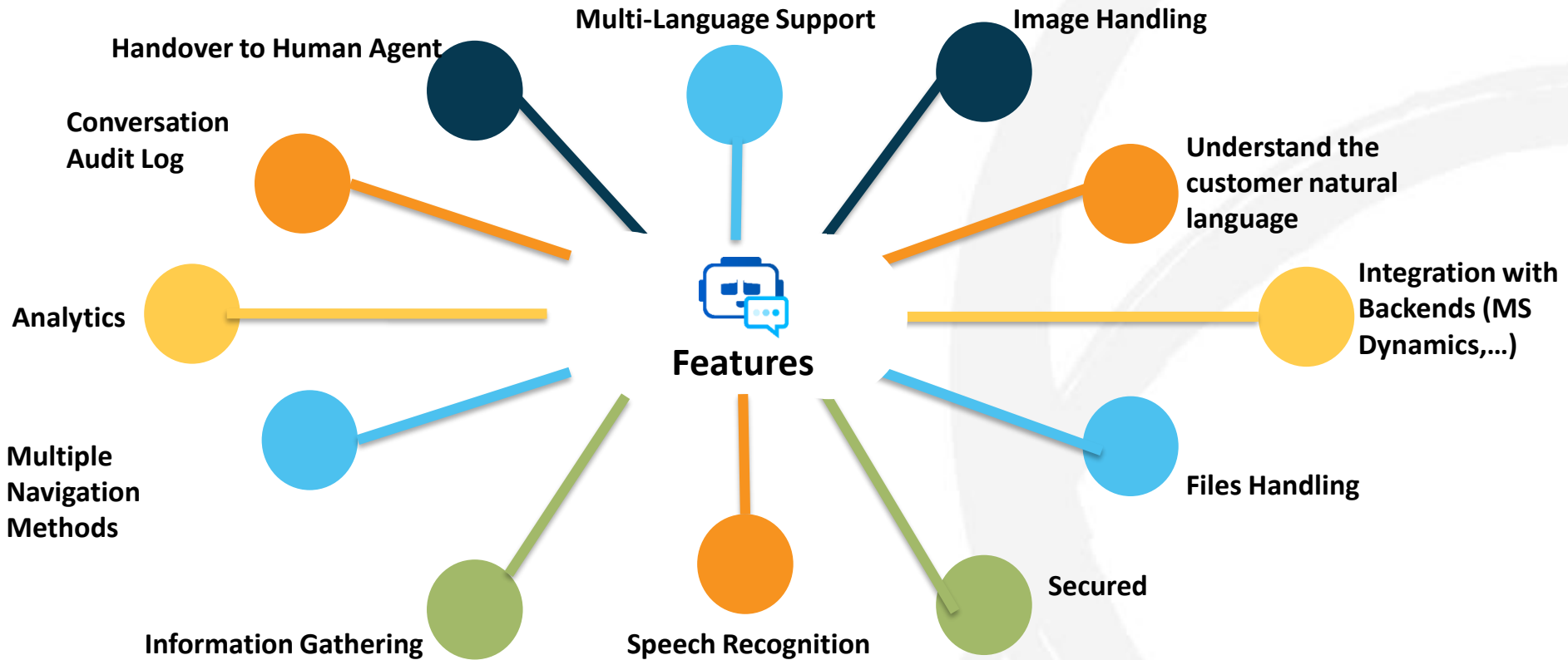
- CSR web based interface
- Call Center integration (CTI)
- Mobile applications (iphone, BB, etc.)
- CRM Desktop
- PRM
- Email Response
- SMS
- Social CRM

7- Multi-Channel Integration

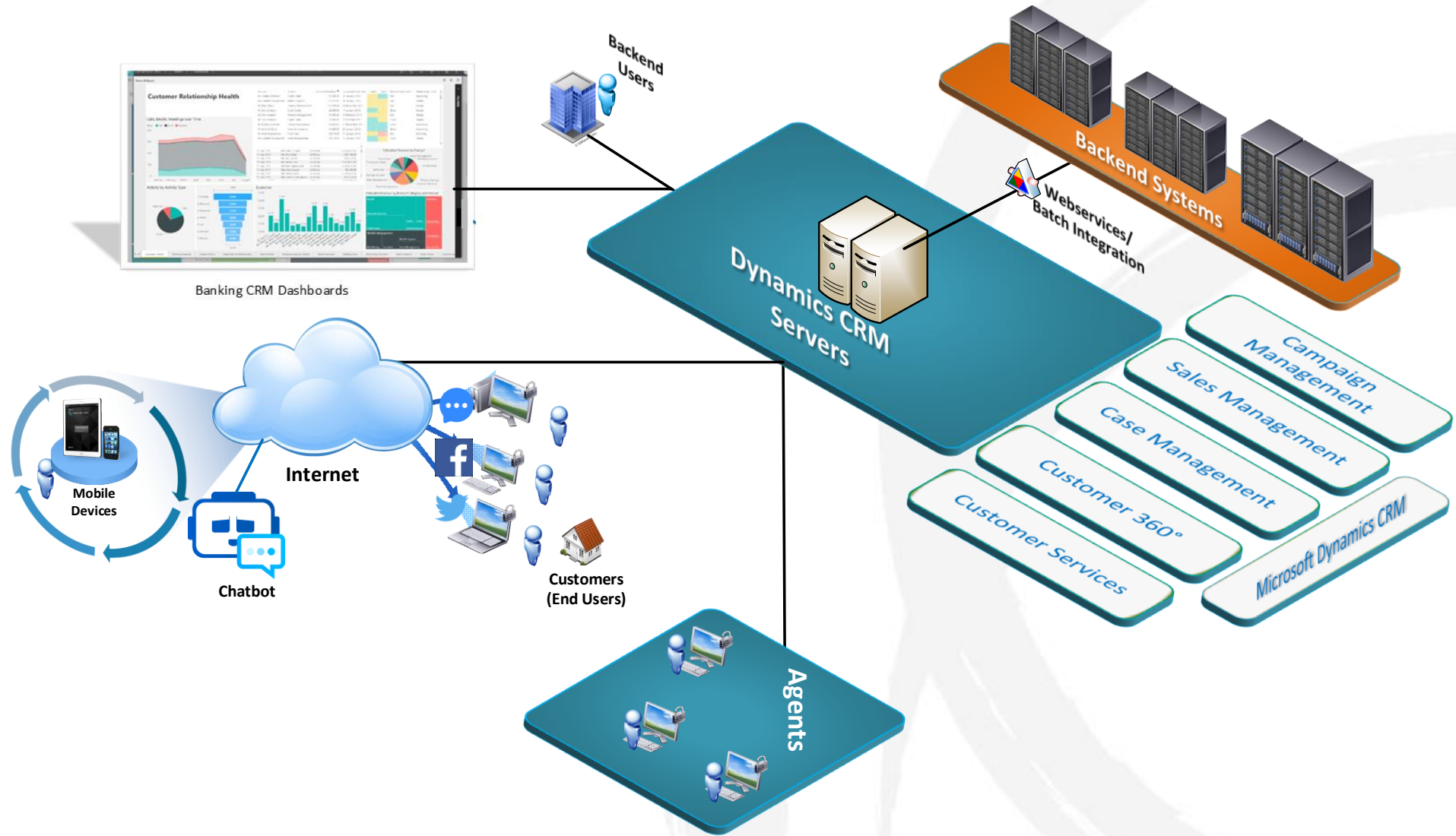
- Different plans
- Calculations formulas
- KPI's & dashboard
- Payments

8- Incentive Compensation

eBot Product Features



Banking CRM Logical Architecture (1 of 2)



Banking CRM Logical Architecture (2 of 2)

