



Banking the way it's meant to be. Personalized. Outrageously Easy. Secure.

IDENTIFY
YOUR HIGHEST
VALUE CUSTOMERS



UNDERSTAND
THEIR FINANCIAL NEEDS
AND RELATIONSHIPS

INCREASE CROSS-SELL
GENERATE REFERRALS

EXPEDITE RENEWALS & LENDING

Stunning User Interface

In the age of Amazon, Netflix and LinkedIn, we're here to give banking CRM software a major upgrade.

We bring your bankers closer to your clients by putting everything they need right at their fingertips, a tap or swipe away.

Customer Insights

Provide actionable recommendations and timely alerts for your bankers to proactively engage with their customers around milestone events, major transactions, new opportunities, and more. We continuously improve our customer insights through banking specific machine learning.



To see more: www.banksight.com/video

Built Microsoft Secure

BankSight runs on Microsoft Azure and works seamlessly with Microsoft Business Applications. Based on a banking-specific data model and an open integration architecture, including pre-built connectors to common core, LOS, and other financial systems, BankSight can be deployed in 1/3 the time and at a fraction of the cost of traditional cross-industry CRM.

"BankSight is one of our most important ISV partners in the financial services domain."

- James Phillips, Corporate VP,
Microsoft Business Applications

