iCore360® CRM

Customer Relationship Management

Build Stronger Sales With This Robust, Integrated, Easy-to-use Solution

The iCore360® CRM option helps your financial institution build an efficient sales and service culture to:

- Increase customer loyalty and wallet share
- Eliminate missed opportunities and revenue leakage due to poor handling of leads and referrals
- Make better informed decisions that drive toward strategic goal attainment with greater pipeline visibility and sales forecasting
- Motivate employees with accurate compensation and rewards while developing stronger client relationships

The Power to Automate

iCore360® CRM is a robust, easy-to-use CRM/sales force automation solution integrated directly into iCore360® to help everyone easily adapt to client expectations, meet sales goals, and provide exceptional service.

With iCore360® CRM, you have the power to automate:

- Lead, referral, and profitability tracking
- Contact and pipeline management
- Next-best product cross-sell recommendation
- Service Center case management
- Up-to-date marketing campaigns
- Employee incentive, compensation, and goal performance tracking
- On-demand, comprehensive management reports

Boost Your Performance

Using the latest technology, iCore360® CRM helps elevate your staff's performance:

- Gain a 360-degree view of your clients – a single solution across the entire institution
- Quickly and easily retrieve information using the knowledge base and intranet document storage capabilities
- Send referrals to specific departments, branches, and/or employees
- Calendar synchronization with Outlook, Lotus Notes, and Groupwise

iCore360® CRM provides a no surprises, low total cost of ownership with unlimited users. And we get you installed quickly and help you roll it out at your pace. The difference is clear. Take a look at why financial institutions across the country choose iCore360®CRM.

Build an efficient, accountable and performance-based culture today! Contact DCI for more information.

Core technology you can depend on . . . a relationship you can trust.

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CRM/Profitability Option

Understand each client's distinct profit contribution and unique value to strengthen relationships and growth.

The Profitability option helps:

- Evaluate the Net Interest Margin contribution from each client
- Evaluate the amount and sources of fee income from consumer and business clients
- Assign values for operating costs
- Formulate strategies to optimize profitability:
  - Recognize and attract profitable clients
  - Identify/turn around unprofitable or marginally profitable clients
  - Identify unprofitable relationships and minimize their impact

Results You Can Bank On

- Integration: Full integration into iCore360®. Simple access in iCore360® with single source data for quick, easy, accurate analysis and product/service offers.
- Client Management: View current contacts, demographics, opportunity account relationships, events, notes, documents, product recommendations, and case activity.
- Lead & Referral Management: Create and track prospect progress through entire life cycle. Refer business opportunities and manage pipelines in real-time.
- Autolead: Establish referral queues to the right person based on product, role, department, branch, etc.
- Next-best Product Recommendation: Use any information collected in the system to easily recommend the right product, to the right person, at the right time.
- Service Case Management: Track all activities generated by inbound service calls, to capture business and referral opportunities.
- Marketing Campaign Manager: Target top candidates for a specific product or promotion with activity-driven reminders.
- Help Desk: Track internal service issues such as "printer not working" or "forgot password".
- Compensation: Set flexible incentive or compensation plans by role, employee, branch or strategic sales and service goals.
- Performance View: Monitors pipeline, production, goals, and incentive compensation earned to date.
- Calendar: Schedule calls, meetings, events and tasks. Stay organized and collaborate on shared opportunities.
- Synchronization: Synchronize calendar, contacts, and tasks between applications. Access up-to-date intelligence from any location.
- Reports: Reports on referrals, pipeline, production, goals, performance, calls, and training by branch, user, product, and/or date.
- Document Referencing: Attach important documents to a record for quick and easy reference.
- Administration: Tailor functions to your unique terms, products, permissions, etc.
- Training: Publish and organize training by month/year. Immediate access to training materials whenever needed.
- Resource Center: Easily access HR forms, training tests, compliance information, promotional fliers, and more.