

SOLUTIONS FOR FINANCIAL SERVICES

With Microsoft Dynamics® CRM

by
PowerObjects

Introduction

In today's economy, organizations need to find a way to attract and retain customers—and that is through delivering exceptional customer service. As a result, many financial services organizations are seeking the right customer relationship management (CRM) solution to help them accomplish this.

Microsoft Dynamics CRM can manage the entire life cycle of a customer to help an organization build and maintain successful relationships. **This is not a single point software solution—Microsoft Dynamics CRM is a fully customizable, powerful business solution that helps organize and automate processes across your entire business.** Whether it's improving sales, increasing marketing effectiveness, or delivering better customer care, Dynamics CRM collectively helps businesses across the board by reducing costs, increasing productivity and improving the bottom line. Microsoft Dynamics CRM is the best solution for financial services organizations in the areas of wealth and asset management, insurance, banking, and more.

A 360-Degree View

If your organization struggles with managing multiple databases, you're not alone. Dynamics CRM allows you to consolidate disparate data into one centralized database, creating a 360-degree view of clean, accurate information. Imagine having instant access to a comprehensive view of a customer—right at your fingertips! You can easily track every customer interaction, from sales to service. No more having to manage multiple screens or applications. No more keeping track of multiple login information. No more scattered data across different departments or branches. Here's how Dynamics CRM can help:

CUT OUT THE CLUTTER

Microsoft Dynamics CRM enables your teams to quickly access pertinent information about accounts, products, services, and transactions. All customer data is located in a single desktop and you can access the right information when you need it. Dynamics CRM eliminates redundant solutions and consolidates data into one system to save time and improve productivity. Dynamics CRM gives you the up-to-date information you need to provide high quality customer care and maintain satisfied customers, helping you to make every customer interaction informative, effective, and profitable.

BETTER OPPORTUNITY MANAGEMENT

With Dynamics CRM you can identify potential customers and see a complete dashboard view of each prospect including history, meeting notes, attachments, communications, open proposals, and product interests. You can identify your most valuable prospects, get to know your prospect before walking into a meeting, create targeted offers, and track sales activities and key trends.

Dynamics CRM provides better visibility into the sales pipeline, agent or broker productivity, claims processing, customer loyalty, and more, with real-time dashboards and analytics. Microsoft Dynamics CRM provides greater insight into opportunities, allowing you to track leads from start to finish and focus time and resources more effectively on deals with a higher probability to close.

"Now that we have one view of our data, we can track customer interactions, prioritize our sales efforts and target certain accounts. Having insight into the sales pipeline has allowed the sales team to focus and close deals faster. We've been able to more than double the number of new customer adds per month with the help of CRM."

Phil Telesco, President of Payment Processing Partners

Deliver Outstanding Customer Service

You can create a more customer-centric organization with the help of Dynamics CRM. We know your customers are important to you and that the financial services industry needs real-time data in order to provide the best and most efficient service possible. Dynamics CRM can help you improve customer loyalty and renewal rates by handling inquiries more efficiently, streamlining claims resolutions, and facilitating proactive customer service. Taking your service to the next level means being able to create a personalized experience and to help develop long-term connections with your customers. Here's how Dynamics CRM can make it happen:

PERSONALIZED AND PROACTIVE SERVICE

When engaging a customer, advisors or agents in your organization can view a customer's complete profile in Dynamics CRM. They can open a customer overview; see their account summary, any noted interactions, and recent activities. This quick access to customer information will allow your team to have personalized interactions and deliver even more value in their interactions.

Not only can Dynamics CRM provide a view of your customers' current and past information, but it also allows you to help your customers plan for the future. In Dynamics CRM, any data can be easily changed in real-time to fit your customers' changing needs and lives.

Having all this knowledge in a single location will allow your organization to become more agile and to better deliver on your customers' needs. Financial advisors, insurance agents, brokers, and portfolio managers can all build the customer loyalty and trust needed for the long haul.

"We now have an integrated CRM system that everyone can access right in Microsoft Outlook. Having the information we need at our fingertips has allowed our teams to work smarter and focus on building stronger relationships and serving our client's needs."

Brian Price, President of PriceKubecka

SOLUTIONS FOR CONTACT CENTERS

Dynamics CRM will help your service agents provide fast and effective customer service all from a unified service desk. By having all customer data centralized into a consolidated system, you can eliminate your agents' need for multiple applications and logins—resulting in an average handle time decrease. Your contact centers will be able to handle more interactions and provide an optimized customer experience.

Customer service centers can also take advantage of intuitive case management capabilities to streamline case creation, tracking, resolution, and escalation, making sure nothing falls through the cracks. Using workflows, Dynamics CRM provides the ability to record customer interactions, track cases and automatically trigger an escalation procedure to inform the customer service manager if needed.

Utilizing the multichannel capabilities of Dynamics CRM will allow you to engage your customers through a variety of channels – including mobile, web, social, and chat.

A MOBILE WORKFORCE

Whether you're travelling or working on the go, you can still access all the information need with a few taps on your phone or tablet. You don't have to feel tied down to your desk anymore. Simply look up customer and interaction information before heading into a meeting or make quick changes and additions all within the Dynamics CRM mobile application. The ability to quickly review important data can mean the difference between a won or lost deal. Dynamics CRM has easy mobile access wherever you may be—you will never miss a beat while on the road.

Improve Operations and Productivity

Dynamics CRM can solve common problems that financial service organizations face such as disconnected systems, cumbersome and redundant data entry, long onboarding time, and high operational costs. If these types of problems plague your organization, CRM solutions like Dynamics CRM can provide the tools to enable your team to do their jobs more efficiently and more effectively, ultimately improving the bottom line. Here's how Dynamics CRM gets the job done:

REDUCE ADMINISTRATIVE TASKS

Dynamics CRM can boost productivity and reduce costs by automating your key tasks and processes to improve your operational efficiency across branches, call centers, and offices. Dynamics CRM helps you to minimize administrative tasks and busywork and allow your organization more time for meaningful customer interactions.

ELIMINATE THE DISCONNECT

Dynamics CRM has cross-organizational applicability so different departments and different branches have access to a unified view of customer information. Keep your sales, marketing, and customer service processes integrated to better deliver services across your organization. Since all changes in Dynamics CRM are made real time, it is much easier to keep different departments within your organization connected and up-to-date with accurate data and reporting.

MAINTAIN REGULATORY COMPLIANCE

Through out-of-the box or customized workflows that reflect your internal business operations, you can manage everything from client onboarding to quarterly reports and regulatory-required processes. Dynamics CRM can help ensure that you meet regulatory compliance. You can easily incorporate any changes needed for regulations and compliance, and utilize workflow and auditing capabilities to automatically capture and track key data.

SEAMLESS INTEGRATION

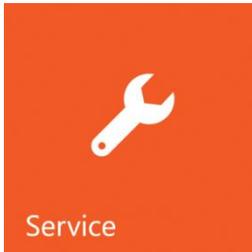
A big part of Dynamics CRM's success with user adoption has to do with the familiar interface. The platform shares the same look and feel, plus many features and functions of other Microsoft Office products that businesses use daily. Because Dynamics CRM is directly integrated with Microsoft Outlook, it allows staff to manage customer e-mail, appointments, tasks, and contacts from a single business application. In addition, no matter if your team is on the road or in the office, they will have access to real-time information at their fingertips. Dynamics CRM is fully customizable and can be tailored to integrate with your everyday processes in addition to any existing front and back office tools.

Final Thoughts

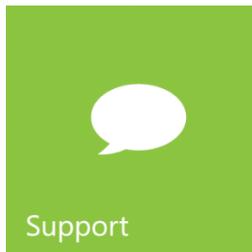
The right CRM solution can have a dramatic impact on financial service organizations of all sizes. Dynamics CRM offers outstanding end-to-end CRM functionality—from lead generation to sales to customer support—while providing a foundation for growth. The financial services industry needs a platform that is more than a single point solution. Dynamics CRM helps organizations **centralize and manage extensive customer data, streamline and automate processes, develop long-term customer relationships, and improve sales and service**—resulting in greater insights and a competitive advantage. These are just some of the benefits Dynamics CRM can bring to your organization. Investing in Dynamics CRM is a smart business decision that provides quick returns and is a vital component to any business strategy.

About PowerObjects

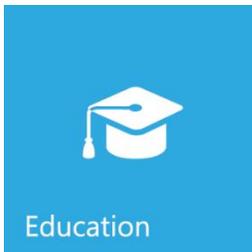
PowerObjects is a professional services firm 100% focused on providing service, support, education and add-ons for Microsoft Dynamics CRM.



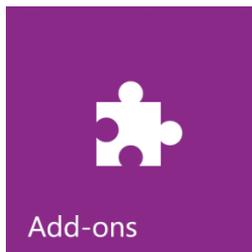
PowerObjects tailors **services** for different customers, from the small businesses and do-it-yourself crowd to enterprise-level, large-scale implementations. Programs include PowerSuccess, XRM, RxRM (CRM for Healthcare), customized portals, integration with other systems and much more.



We are passionate about offering awesome, responsive **support** to Microsoft Dynamics CRM users. Customers can choose from standard on-demand support or premium services like PowerSupport. Real-time support information is available through our communications portal, PowerCare.



PowerObjects promotes Dynamics CRM **education** to empower users to get the most out of Dynamics CRM, offering training on everything from user basics to advanced topics. We constantly add to our CRM How-to Portal, and host an annual Dynamics CRM educational conference.



We are always improving and adding to our suite of Dynamics CRM **add-ons**, dubbed the PowerPack suite. These include tools for sales, marketing, productivity, and more. We've also developed Power8CRM— a Dynamics CRM companion app for Windows 8 tablets.

www.powerobjects.com | 866.770.3353