

# SIMPLIFY WORK

ONE PLATFORM FOR EVERYONE

## 30,000 FT. VIEW

**20**  
COUNTRIES  
**4**  
CONTINENTS

**BANKS** OF ALL SHAPES & SIZES

**1 MILLION+**  
BANKERS  
**1 BILLION+**  
END-CUSTOMERS



**>80%**  
ADOPTION  
across organization

## CUSTOMER OPERATIONS

### SIMPLIFY ACCOUNT OPENING

**6** OPEN accounts in 6 easy steps  
EASY STEPS

REDUCE account opening time by **75%**

### RESOLVE CASES FASTER THE FIRST TIME

**90%** REDUCTION in service interaction times  
**60%** INCREASE in net promoter score

ANY BANKER can address the needs of any customer

### CAPTURE ALL INFO IN CUSTOMER 360

AGGREGATE data, communications, history, etc. from all systems

INSTANTLY UPDATE profiles with new info and notes

### AUTOMATE MANUAL TASKS AND STREAMLINE WORKFLOWS

ELIMINATE DUPLICATE entry of information

Open a CREDIT CARD **IN 30 SECS**

REDUCE opportunity for HUMAN ERROR

## SALES

### MAXIMIZE AFFORDABLE, SCALABLE GROWTH OPPORTUNITIES

**10X** CHEAPER to sell more products to existing customer than acquire a new one.

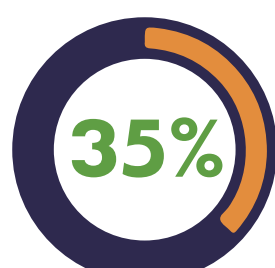
Predictive data analytics INCREASE CROSS-SELL BY **50%**

### BETTER LEAD MANAGEMENT

Auto-assignments, qualification scripts & customized workflows ensure **NO LEADS ARE DROPPED**

**71%** of leads **NEVER RECEIVE FOLLOW UP**

## ACHIEVE AND EXCEED SALES TARGETS



IMPROVE lead-to-conversion RATIO BY **35%**

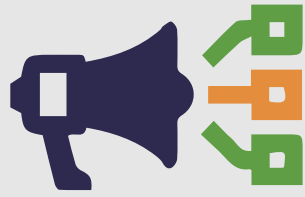


**300% INCREASE** in sales from digital channels



**80% IMPROVEMENT** in sales turn-around times

## MARKETING



Make campaigns **MORE EFFECTIVE**



Evaluate marketing efforts with **ADVANCED CAMPAIGN ANALYSIS**



Better campaign **EXECUTION**

**RIGHT MESSAGING** at the right moment

Avoid contact fatigue by **OPTIMIZING COMMUNICATION**

Track CPL, CPS, etc. to **QUANTIFY** campaign ROI

Get **ACTIONABLE INSIGHTS** through customizable reports

Prioritize leads with **AI-POWERED** scoring

Generate up to **170% MORE** qualified leads

## LEADERSHIP



Create a **DASHBOARD** in **<2 MIN**

More accurate **FORECASTING**

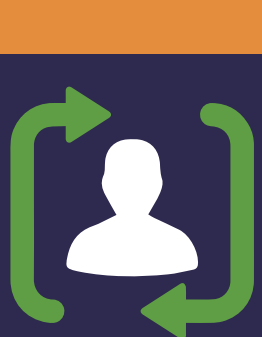
## GAIN BETTER VISIBILITY ACROSS ALL ASPECTS OF THE BUSINESS

**40%** **40% INCREASE** in bottom-line revenue

**60%** **60% INCREASE** in employee productivity

REDUCE operating costs

## IMPROVE EFFICIENCY RATIO



## INCREASED EMPLOYEE RETENTION

**OVER 1/3** of bank employees quit within 1st year due to lack of training

It costs **\$4,000 ON AVERAGE** to recruit, hire and train one new employee

**STANDARD WORKFLOWS** help new hires ramp up faster

Automation reduces manual tasks by **UP TO 60%**, freeing up employees for higher-level contributions

## IT

### REDUCED TIME DEMAND

**80%** faster integrations

System updates in **<1HR**

Codeless configuration requires little to **NO ADMIN EXPERTISE**

### LESS BURDEN MAINTAINING LEGACY TECHNOLOGY

Platform **INTEGRATES** core and other banking systems

Sunsets **MULTIPLE** redundant applications

Reduce system timeouts with a **SINGLE LOG-IN**

### DECREASE COMPLIANCE RISKS

