

The IBM Banking Solution for Microsoft Dynamics CRM

Use analytics to elevate the customer experience



Highlights

- Uses advanced analytics to create a customer-centered enterprise
 - Provides an end-to-end, data-driven approach to innovation and customer satisfaction
 - Helps improve customer loyalty by delivering compelling customer service experiences, virtually anytime and anyplace, via omnichannel, self-service capabilities
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In today's competitive financial marketplace, winning in banking means gratifying customers with every interaction. But to give customers exceptional service experiences, you must first know their needs and preferences. Empowered with this insight, you can make suitable offers, provide effective customer service and communicate with your customers consistently and effectively. IBM provides an offering that can help you realize all these benefits and more.

IBM® Banking Solution for Microsoft Dynamics CRM is an end-to-end solution that combines powerful analytics technologies with Microsoft Dynamics CRM. The solution incorporates mobile, analytics, next best action/product, gamification, digital signature, self-service and social capabilities to deliver business intelligence and data visualization capabilities. These capabilities can equip your teams with a 360-degree view of your customers that captures their preferences, needs, desires — and even social media commentary about your products. They also help you not only make more effective offers to customers, but also know how, where and when to make them.

Coupled with the option to deploy on premise, on the IBM Cloud, or on Microsoft Cloud, you can get started more quickly and cost effectively.

Use analytics to enable innovation and create a customer-focused enterprise

The IBM Banking Solution for Microsoft Dynamics CRM helps you know and understand your customers like never before, enabling you to:

- Learn more about your customers' buying patterns, activities and recent experiences with your products or services by pulling data from a range of your systems (cloud, legacy, nontraditional)
- Analyze your customers' needs, preferences and opinions about your products and services by gathering information from social media, social networks, Internet forums, phone calls, web analytics and mobile apps
- Use cognitive computing and competitive analysis across your enterprise to create next best product offers and next best action responses to customer events



With a holistic view of your customers, that details who they are, what business transactions they've done with you, how they prefer to interact with you, and how they feel about you, the possibilities for elevating your customers' banking experience are virtually endless.

Use our offering to help:

- Eliminate inconsistencies across customer interaction points
- Analytically fine-tune the criteria by which your organization makes customer-facing decisions
- Monitor business trends and customers' ongoing behavior
- Make appropriate product and service recommendations
- Initiate interactions via a more effective channel and strategy — at the right time
- Tailor your marketing and customer service efforts according to your customers' needs, preferences and buying habits
- Recommend and deliver services to customers proactively with visual representations of their buying patterns, promotions and service offering preferences
- Drive innovation by launching products and services tailored to your customers' wants

Here are some use cases to demonstrate practical applications of these capabilities:

- Generating upsell and cross-sell offers to customers who are preapproved for a loan (and considering numerous variables automatically, including credit and compliance checks, to make these offers)
- Recommending a solution to a customer who has exceeded an overdraft fee, based on account history and notes from service calls
- Alerting sales and marketing representatives to a customer who recently filed a formal complaint
- Determining which customers are more likely to purchase certain banking products and investments and making a tailored offer to these customers
- Achieving customer service management efficiencies over the entire range of your bank's products and customers

Improving customer loyalty with omnichannel, self-service capabilities

The IBM Banking Solution for Microsoft Dynamics CRM provides a process-driven user interface that's available across desktop and mobile devices.

The solution enables your agents to:

- Use the power of business productivity applications, web publishing and collaboration technologies to optimize efficiency and communication

- Create exceptional customer experiences through a combination of knowledge management, self-service and multichannel interactions
- Deliver a unified service experience that can increase efficiency and effectiveness through consistent collection, management and resolution of customer service issues across practically all major channels
- Streamline collaboration within your organization, listen to the market, and engage with customers and prospects on your own terms with social listening
- Enhance marketing efficiencies with advanced capabilities and intelligence to respond rapidly to customers' needs and desires

Why IBM and Microsoft?

By choosing IBM and Microsoft, you can take advantage of vast expertise, ready-to-use software and best-of-breed solutions specially designed for banking. IBM is one of Microsoft's largest global partners and has been a member of the Microsoft Certified Partner program since 1995. Utilize our vast experience to advance your organization's growth and profitability through our Microsoft Dynamics CRM banking solution.



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