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CRM FOR BANKING

Comprehensive CRM Solution for the Banking Sector on MS Dynamics 365

At Awara IT, we deliver a complete CRM solution designed specifically for banks. Our system integrates seamlessly with external scoring, credit bureaus, core banking systems, telephony, BI, chatbots, websites, mobile apps, and messengers.

WE OFFER

- **A fully integrated, end-to-end CRM platform that streamlines credit workflows and centralizes customer data.**
- **Advanced credit conveyor functionality for both individuals and legal entities, ensuring transparent, SLA-backed processes.**
- **Automated cross-sales, marketing campaigns, and omnichannel support combining web chat, WhatsApp, mobile apps, and softphone calls.**
- **Exclusive banking benefits including up to 70% licensing discounts and potential Microsoft co-financing.**

BEST FOR

- Mid-sized to large banks and financial institutions aiming to digitize and optimize their operations.
- Banking executives, credit managers, IT leaders, and compliance officers seeking a unified, integrated solution.
- Financial institutions using Microsoft Dynamics 365 that want to break down silos and achieve a holistic view of customer relationships.

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50%
faster credit processing cycle

60%
reduction in processing errors

40%
increase in cross-sell conversions

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KEY BUSINESS OUTCOMES & BENEFITS

- **Increased Operational Efficiency:** Streamline credit processing and customer management across all departments.
- **Enhanced Customer Insights:** Leverage a complete view of customer interactions for better decision-making and targeted cross-selling.
- **Optimized Marketing and Sales:** Automate personalized offers and follow-up actions to boost revenue and customer loyalty.

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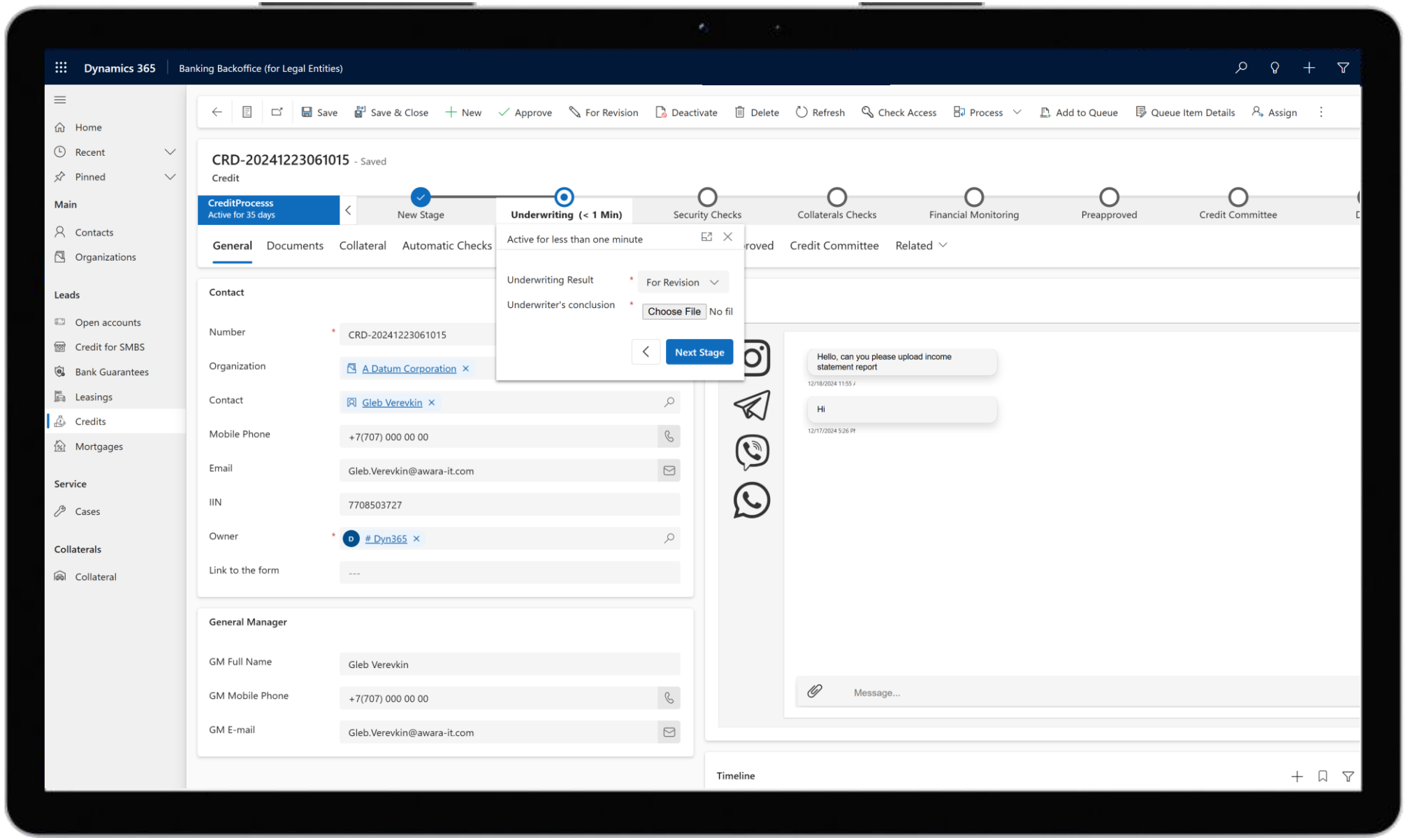
Dynamics 365
Banking Backoffice (for Legal Entities)
Save
Save & Close
New
Approve
For Revision
Deactivate
Delete
Refresh
Check Access
Process
Add to Queue
Queue Item Details
Assign
Home
Recent
Pinned
Main
Contacts
Organizations
Leads
Open accounts
Credit for SMBS
Bank Guarantees
Leasings
Credits
Mortgages
Service
Cases
Collaterals
Collateral
CRD-20241223061015 - Saved
Credit
CreditProcesss
Active for 35 days
New Stage
Underwriting (< 1 Min)
Security Checks
Collaterals Checks
Financial Monitoring
Preapproved
Credit Committee
Active for less than one minute
Underwriting Result
For Revision
Underwriter's conclusion
Choose File
No fil
Next Stage
General
Documents
Collateral
Automatic Checks
Credit Committee
Related
Contact
Number
CRD-20241223061015
Organization
A Datum Corporation
Contact
Gleb Verevkin
Mobile Phone
+7(707) 000 00 00
Email
Gleb.Verevkin@awara-it.com
IIN
7708503727
Owner
Dyn365
Link to the form
General Manager
GM Full Name
Gleb Verevkin
GM Mobile Phone
+7(707) 000 00 00
GM E-mail
Gleb.Verevkin@awara-it.com
Hello, can you please upload income statement report
Hi
Message...
Timeline

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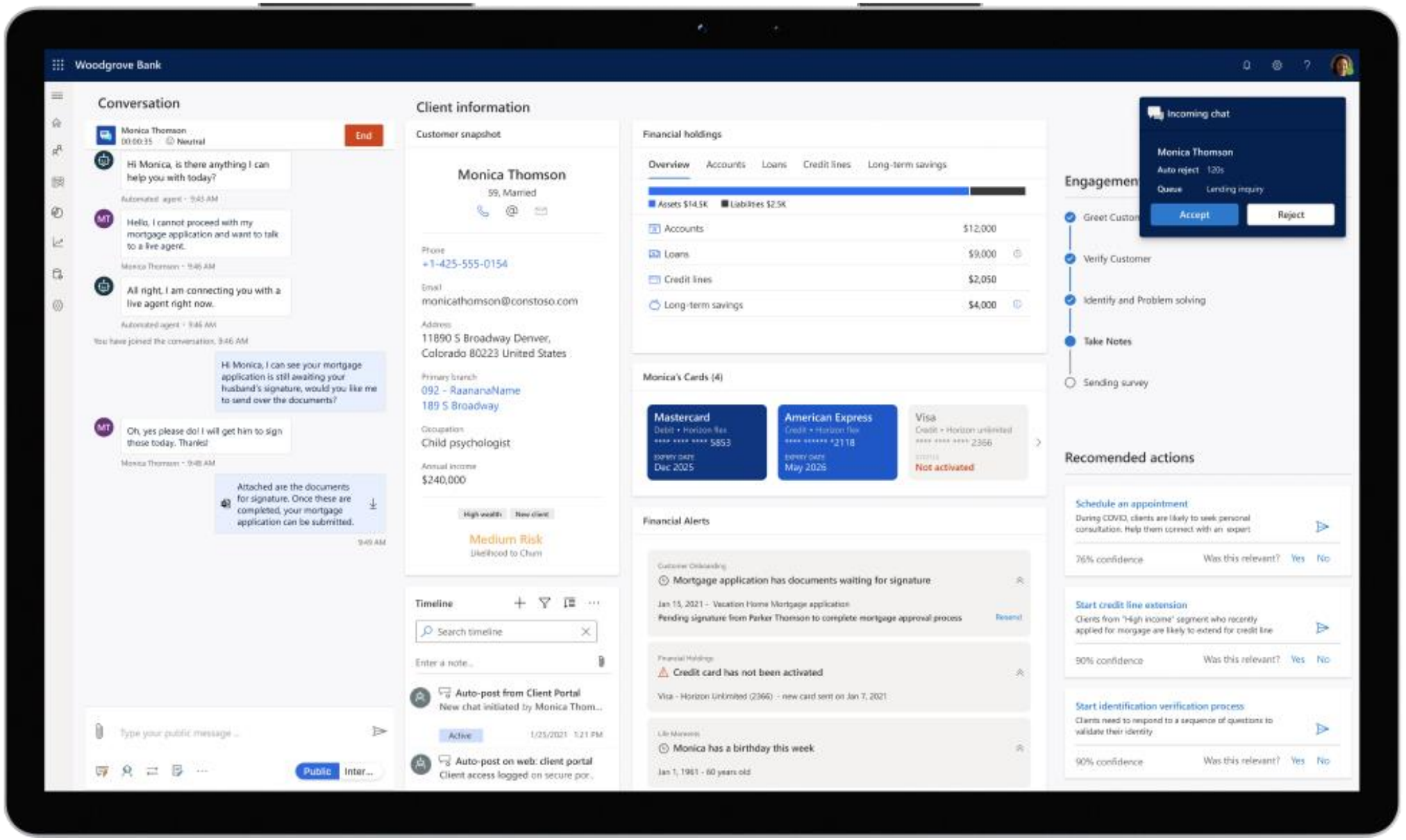
Woodgrove Bank
Conversation
Monica Thomson
End
Hi Monica, is there anything I can help you with today?
Hello, I cannot proceed with my mortgage application and want to talk to a live agent.
All right, I am connecting you with a live agent right now.
Hi Monica, I can see your mortgage application is still awaiting your husband's signature, would you like me to send over the documents?
Oh, yes please do! I will get him to sign these today. Thanks!
Attached are the documents for signature. Once these are completed, your mortgage application can be submitted.
Type your public message ...
Public
Client information
Customer snapshot
Monica Thomson
59, Married
Phone
+1-425-555-0154
Email
monicathomson@constoso.com
Address
11890 S Broadway Denver, Colorado 80223 United States
Primary branch
092 - RaananaName
189 S Broadway
Occupation
Child psychologist
Annual income
$240,000
Medium Risk
Likelihood to Churn
Timeline
Search timeline
Enter a note...
Auto-post from Client Portal
New chat initiated by Monica Thom...
Active
1/25/2021 1:21 PM
Auto-post on web: client portal
Client access logged on secure por...
Financial holdings
Overview
Accounts
Loans
Credit lines
Long-term savings
Assets $14.5K
Liabilities $2.5K
Accounts $12,000
Loans $9,000
Credit lines $2,050
Long-term savings $4,000
Monica's Cards (4)
Mastercard
Debit • Horizon flex
**** **** **** 5853
Dec 2025
American Express
Credit • Horizon flex
**** ****** *2118
May 2026
Visa
Credit • Horizon unlimited
**** **** **** 2366
Not activated
Financial Alerts
Mortgage application has documents waiting for signature
Jan 15, 2021 - Vacation Home Mortgage application
Pending signature from Parker Thomson to complete mortgage approval process
Resend
Credit card has not been activated
Visa - Horizon Unlimited (2366) - new card sent on Jan 7, 2021
Monica has a birthday this week
Jan 1, 1961 - 60 years old
Incoming chat
Monica Thomson
Auto reject 120s
Queue
Lending inquiry
Accept
Reject
Engagemen
Greet Custo
Verify Customer
Identify and Problem solving
Take Notes
Sending survey
Recomended actions
Schedule an appointment
During COVID, clients are likely to seek personal consultation. Help them connect with an expert
76% confidence
Was this relevant? Yes No
Start credit line extension
Clients from 'High income' segment who recently applied for mortgage are likely to extend for credit line
90% confidence
Was this relevant? Yes No
Start identification verification process
Clients need to respond to a sequence of questions to validate their identity
90% confidence
Was this relevant? Yes No

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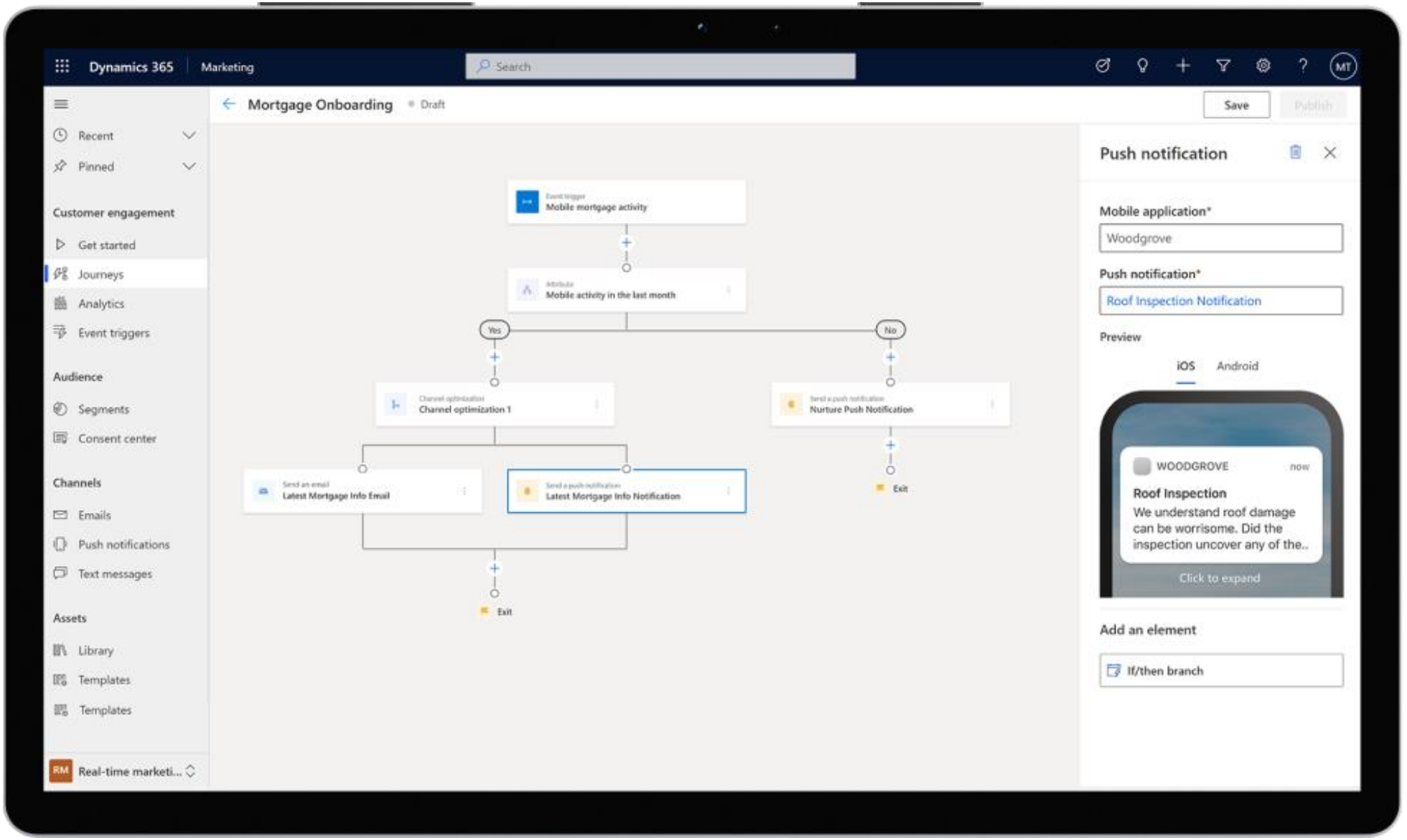
Dynamics 365
Marketing
Search
Mortgage Onboarding
Draft
Save
Publish
Recent
Pinned
Customer engagement
Get started
Journeys
Analytics
Event triggers
Audience
Segments
Consent center
Channels
Emails
Push notifications
Text messages
Assets
Library
Templates
Templates
Real-time marketi...
Mobile mortgage activity
Mobile activity in the last month
Yes
No
Channel optimization 1
Nurture Push Notification
Latest Mortgage Info Email
Latest Mortgage Info Notification
Exit
Exit
Push notification
Mobile application*
Woodgrove
Push notification*
Roof Inspection Notification
Preview
iOS
Android
WOODGROVE
now
Roof Inspection
We understand roof damage can be worrisome. Did the inspection uncover any of the..
Click to expand
Add an element
If/then branch

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Your trusted global partner

ABOUT AWARA IT

We automate key business processes and implement the most innovative solutions, use world-class technologies, manage IT assets, help companies switch to cloud technologies and work in a secure information environment. We work with a wide range of software, from classic office products to large-scale international solutions. We have in-depth knowledge of local implementation specifics, helping clients to optimize their global business.

17+
years on the IT consulting market

200+
certified experts on our team

250+
support and Implementation projects

10+
industries proficiency

Our Team

- Certified consultants, developers, architects, trainers and technical specialists
- Microsoft Most Valued Professionals (MVP)
- Microsoft Certified Trainers

Microsoft Awards

- Microsoft Solutions partner
- Member of Microsoft Inner Circle
- Microsoft Partner Awards Winner
- Microsoft Managed Partner
- Custom Solutions for Microsoft Teams

Geography

PROJECTS

- Europe
- North & South America
- CIS countries
- Australia
- Asia

OFFICES

- Spain
- USA
- Bulgaria
- Finland
- Italy
- Qazaqstan
- Cyprus