



Intelligent CRM exclusively for Financial Services

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Banks need to turn digital



60%

Of banking customers use digital channels*

54%

Of people trust at least one tech company more with their money than banks in general**

80%

Of banking touch-points are through digital channels*

*<https://www.mckinsey.com/industries/financial-services/our-insights/the-balancing-act-omnichannel-excellence-in-retail-banking>

**<https://www.bain.com/insights/in-search-of-customers-who-love-their-bank-nps-cx-banking/>

Problem



Inefficient service

“We don’t have time to really get to know any of our customers because their information is in different legacy systems and often difficult to access and understand when the customer is interacting with us”



Missed opportunity

“We don’t have time to work out the best thing to engage the customer because there are so many different opportunities, actions, rules and regulations to consider”



Lost knowledge

“We don’t have time to record what happened, nor why it happened, because we have to serve the next customer and meet our performance targets”

Solution

An intelligent CRM ecosystem where users can optimize customer engagement strategies to...



Save time

fully understanding customers and opportunities



Increase loyalty
through joined-up conversations and anticipating needs



Save money
through consistent and efficient commercial processes



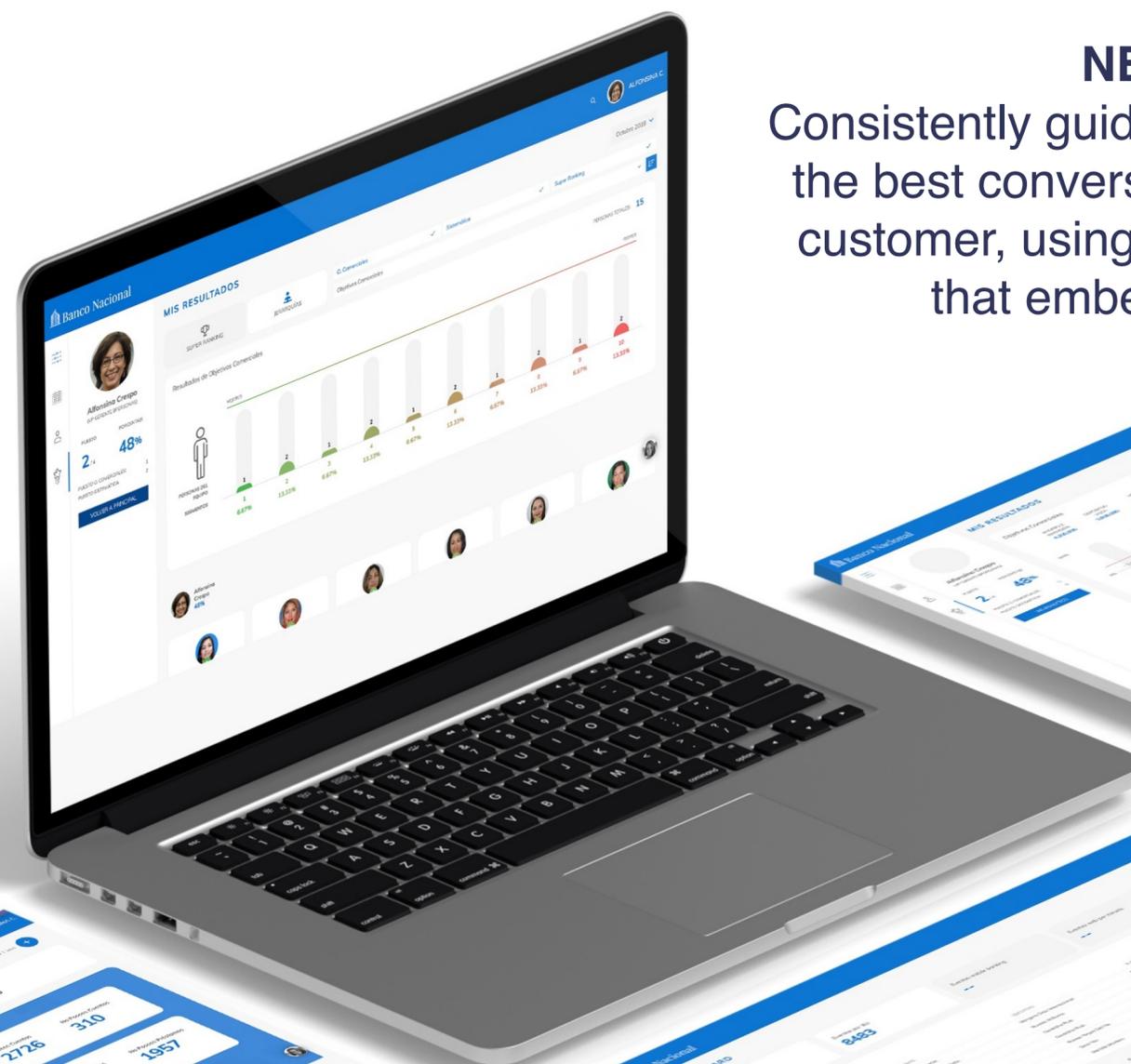
Improve results
from effective recommendations to customers

Product



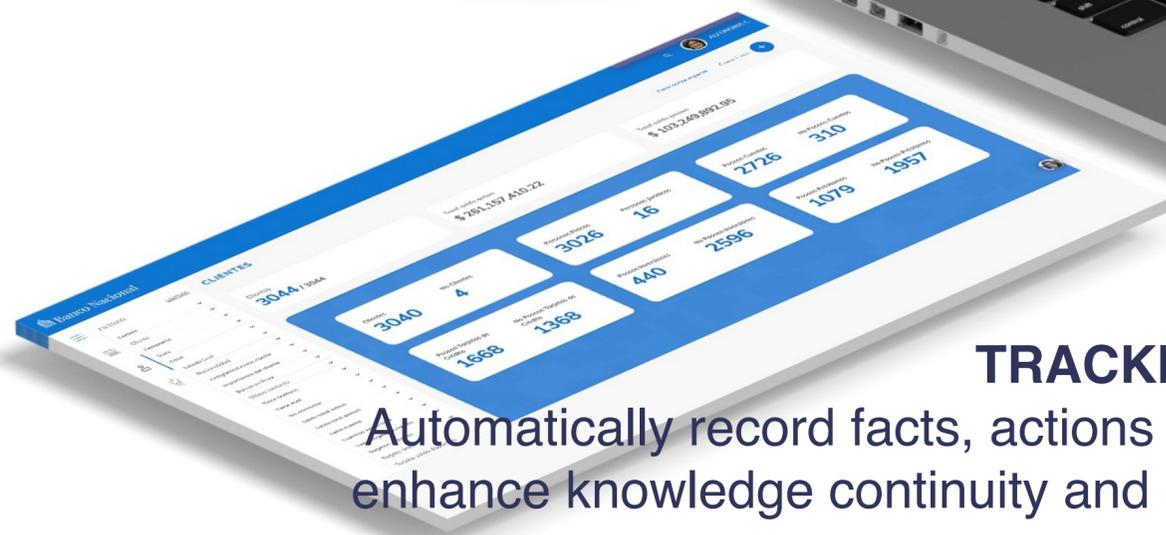
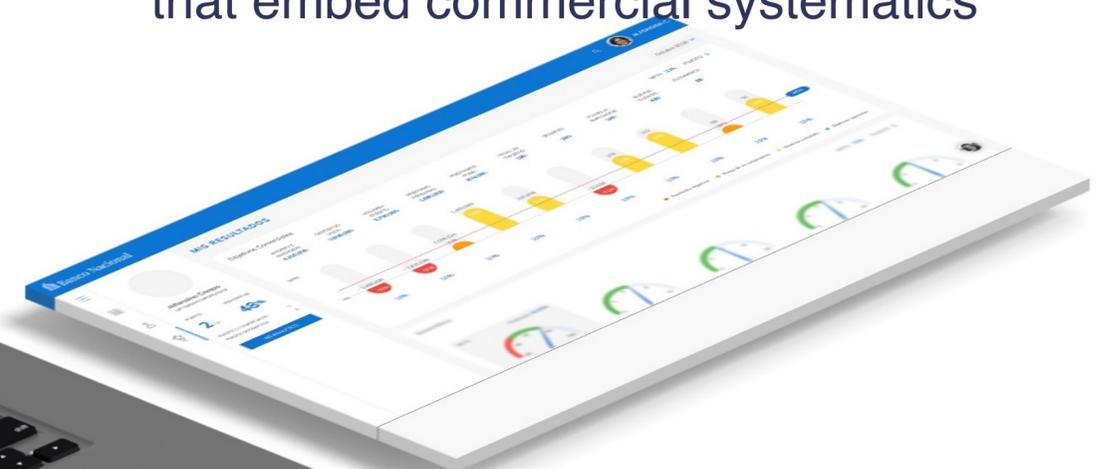
CUSTOMER-ON-A-PAGE

Provide agents with a real-time view of each customer's profile, products, behaviour, propensities, preferences and opportunities, all in one place



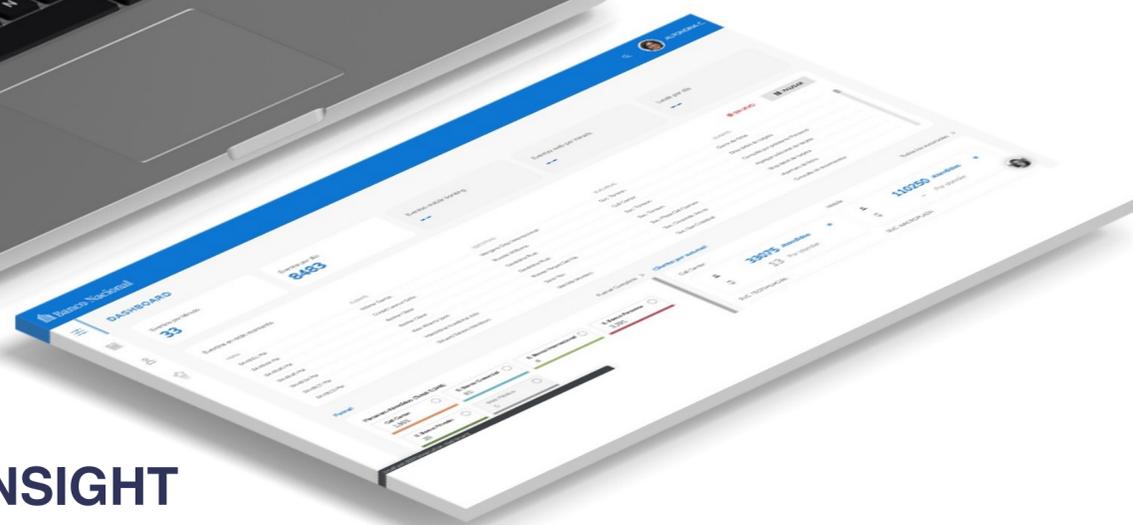
NEXT BEST ACTION

Consistently guide agents and digital channels with the best conversation recommendations for each customer, using state-of-the-art analytics and AI, that embed commercial systematics

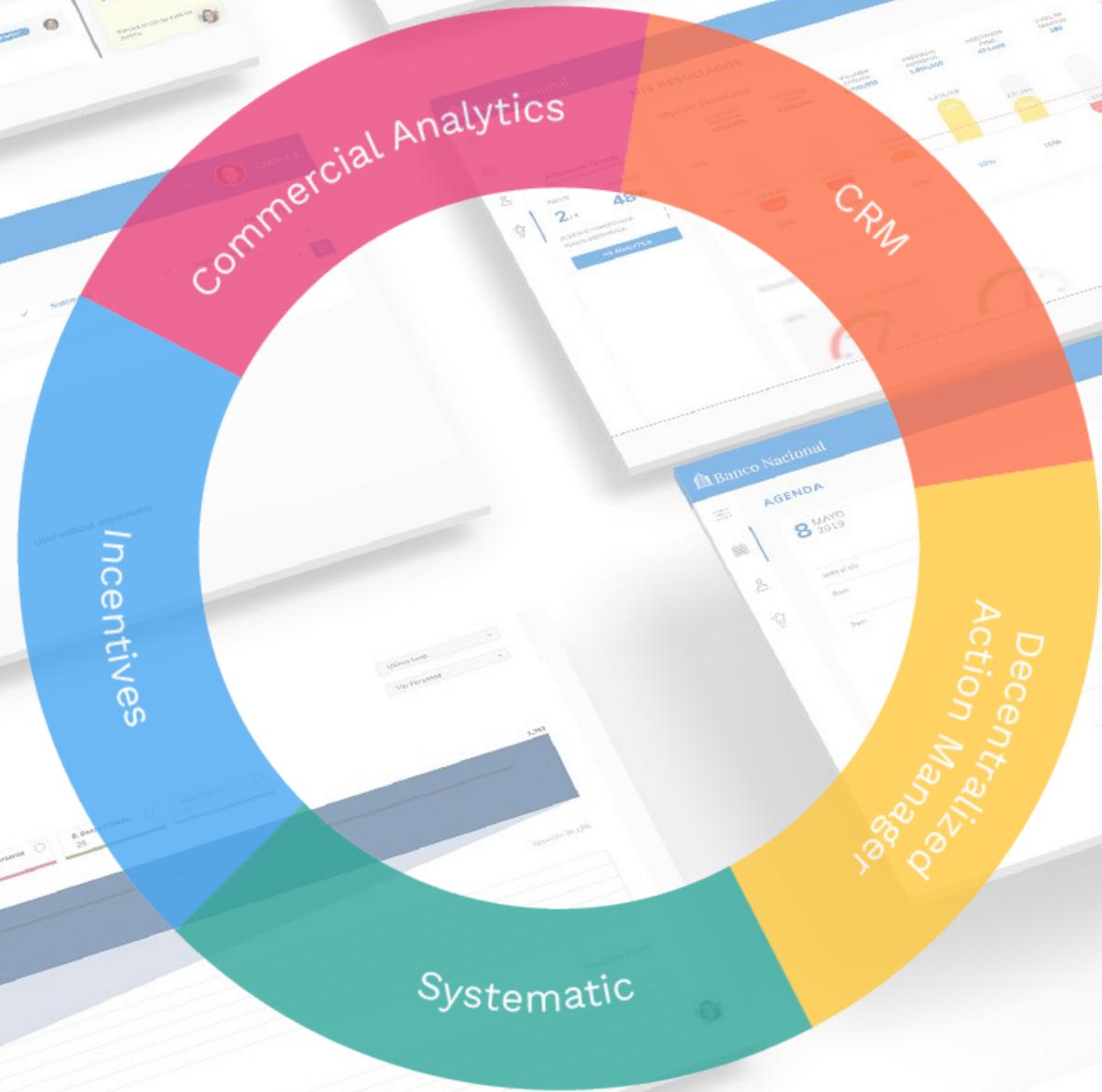


TRACKING & INSIGHT

Automatically record facts, actions and outcomes with minimal intervention to enhance knowledge continuity and insight for continuous business intelligence



Product



Holistic Customer View

Connects instantly to any data source, whether legacy, digital or human using NSA developed technology (NiFi), to enable data discovery, insight and exploitation.

Commercial Systematics

Ensures every agent performs in the right way at the right time to achieve the desired result using integrated time and task management, campaign management and decision management, incentive management, and business supervision.

CRM EcoSystem

Integrates the set of specialist tools into a common platform that can share data, information and insights, and be AI controlled and regulated by specific business rules.

Management View

Comprehensive and real-time management view for a more efficient follow-up of performance.



Competitive advantage



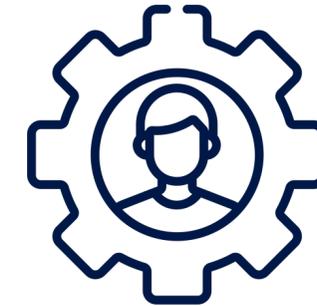
Specialist CRM toolset

Designed exclusively for Financial Services clients



Embedded commercial systematics

Guides agent/customer conversations and actions



Augments user behavior

Doesn't expect users to adapt to technical features



Digital & human synergy

Integrates the best of both worlds



Smooth disruption

High speed deployment and time to value



Tangible results

Already proven in some of the world's biggest FS brands

Latam Clients



Core team



Julian Colombo

Founder, CEO, Visionary

20 years banking experience in 6 countries, including as Global Exec Director for Grupo Santander across CRM and Business Intelligence



Gabriela Ruggeri

Founder, Chairman, Business Development
N years business strategy and development experience. Also Managing Partner for Overboost, Kamay Ventures and Seagrass Capital Partners



Guillermo Monge
Head of
Implementation



Marcelo Pessoa
Head of
Consulting



Diego San Esteban
Business
Development



Mauricio Riquelme
Head of Business
Intelligence/AI

Significant improvements



53%

Commercial productivity growth

99%

User satisfaction rating

25%

Reduction in expected loss in high risk markets

21 pt

Improvement in NPS

16%

Reduction in distribution costs*



Client feedback



“People from branches...will kiss their computer screens when they see this.”

Vice President

“As of today, CrediCorp is a new bank.”

Board Director

“This is a dream come true for any bank in the world.”

President

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Now you know.

