

RM360 – Revolutionizing Relationship Management

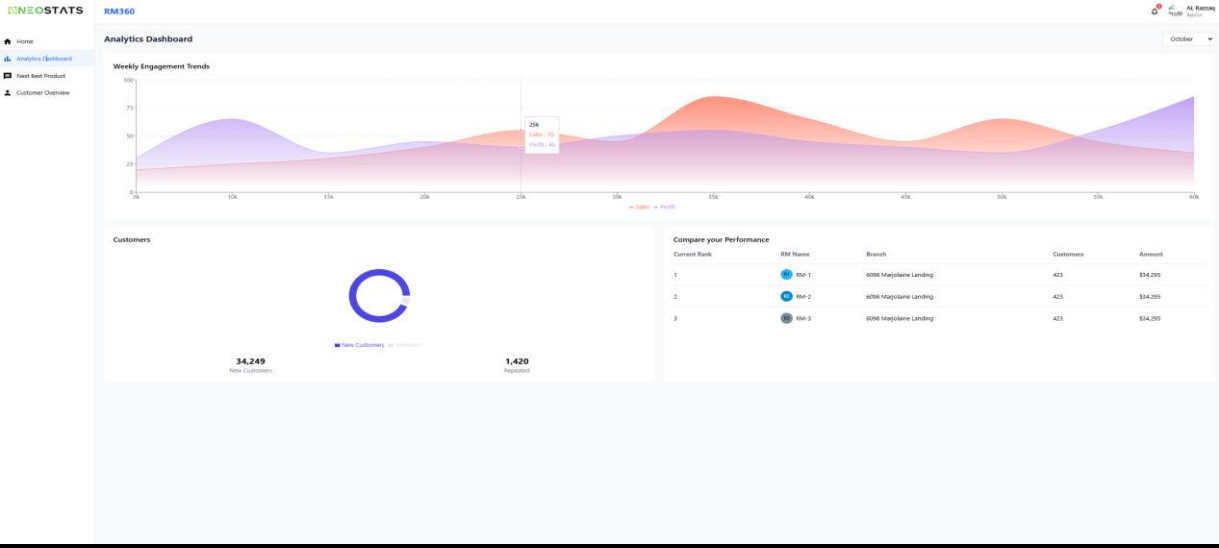
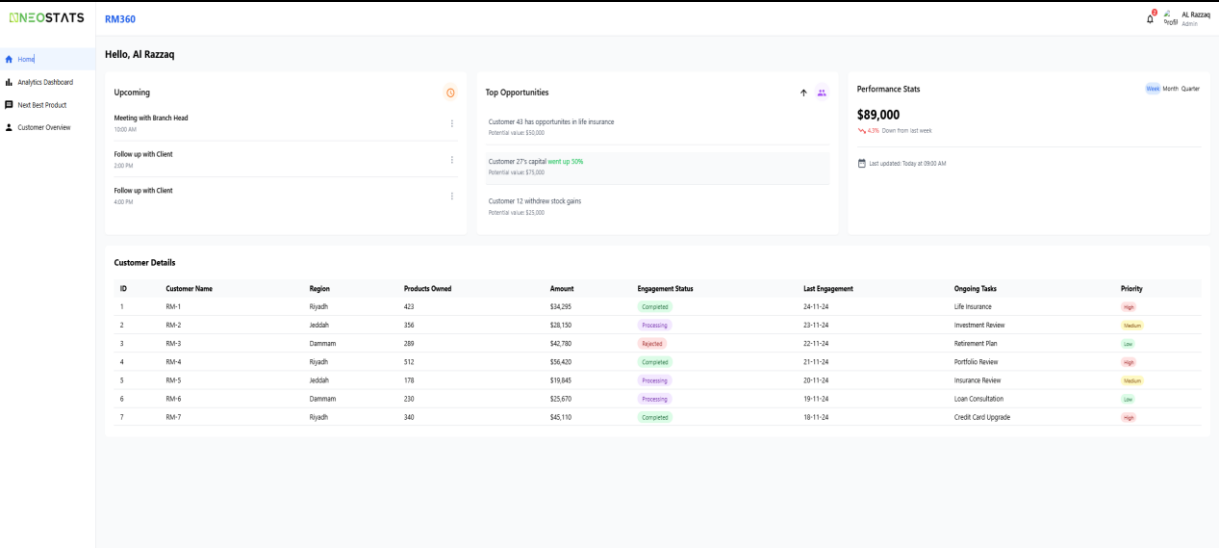
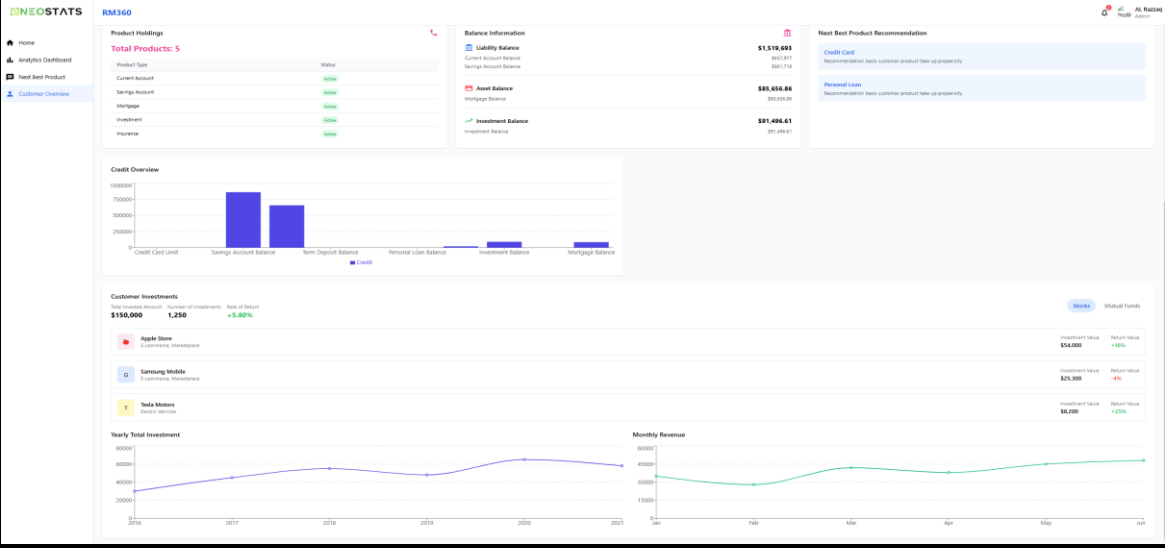
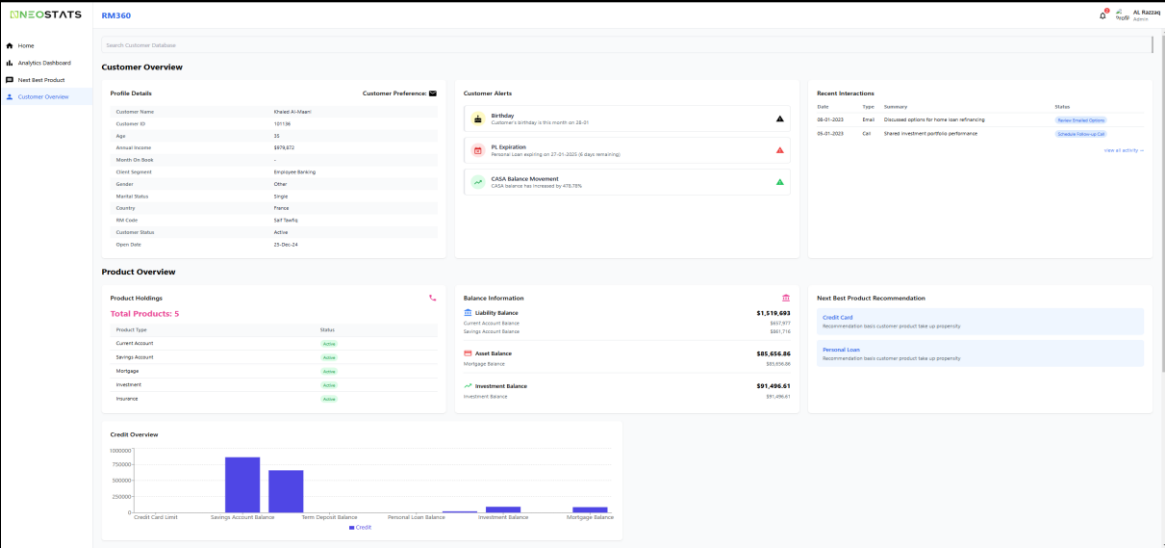
Key Functionalities of RM360

- Utilizes AI to provide predictive insights into customer behaviors and lifecycle events such as loan renewals and risk of attrition.
- Equips RMs with tools for proactive customer engagement, leveraging data to enhance interactions and operational efficiency.

Deep Dive into RM360's Capabilities

- **Data Preparation:** Aggregates customer data including demographics, financial overviews, and interaction histories for comprehensive modeling.
- **Model Training and Implementation:** Incorporates machine learning to forecast customer needs and recommend next-best products, which are integrated into the CRM for seamless operation.
- **Advanced Analytics:** Features a powerful AI-driven dashboard that provides real-time performance analytics, enabling RMs to make informed decisions quickly.

RM 360 Dashboard Overview



RM 360 : RM CockPit

NEOSTATS

RM360

Home

Analytics Dashboard

Next Best Product

Customer Overview

NEOSTATS

Choose RM Name

Saif Tawfiq

Total Customers21

Sales Target657k

Active Customers %71.4%

Sales Achieved %213.3%

Average Products4.24

\$ CASA Sales136k

Asset Balance13.77M

\$ Investment Sales521k

Liability Balance10.85M

Credit Cards Sold33

Investment Balance0.73M

Personal Loans Sold73

RM CockPit

Hi Saif Tawfiq, Welcome to RM CockPit! How can I help you today?

Give me the customers under my portfolio having credit cards

Based on the provided data, the following customers under the portfolio have credit cards:

These customers are actively holding credit cards and are part of the portfolio.

	Customer ID	Customer Name	Customer Segment	Customer Status	Credit Card Limit	Credit Card Statement Balance
0	101,982	Nader Al-Masri	Priority	Active	741,421	11,792.4
1	101,931	Khaled Al-Rawabdeh	General Mass Market	Active	860,188	65,400.7
2	102,345	Khaled Al-Hijazi	Priority	Dormant	121,805	[No Title] 43,968.2
3	101,500	Layla Al-Bakhit	General Mass Market	Active	402,092	84,363.4
4	102,397	Sara Al-Majali	Priority	Active	368,603	59,378
5	101,412	Layla Al-Kurdi	General Mass Market	Dormant	143,962	60,849.2
6	103,029	Tariq Abu Saleh	Premium	Active	215,881	17,627.9
7	103,931	Rami Abu Zaid	Priority	Dormant	364,701	66,322.9
8	103,355	Firas Al-Omari	Private	Active	301,717	82,919.2
9	101,484	Mariam Al-Tarawneh	Employee Banking	Dormant	265,186	22,368.6

Ask a question about your banking data:

Implementation and Impact

- RM360 is easy to implement within existing infrastructures, offering a user-friendly interface and real-time data integration.
- The platform enhances CRM capabilities by providing actionable insights and smart notifications to maintain high engagement levels and ensure no customer opportunity is missed.