

RM360 – Revolutionizing Relationship Management

• 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.

• **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

NEOSTATS	RM360					AL Razzaq		
Home	Search Customer Database							
Analytics Dashboard	Customer Overview							
Next Best Product								
Customer Overview	Profile Details	Customer Preference:	Customer Alerts		Recent Interactions			
	Customer Name	Dated Al-Maani	L Birthday		Date Type Summary 06-01-2023 Erral Discussed options for home ison refinancing	Status		
	Customer ID	101136	Castover's birthday is this month on 28-31	-		Nurley Smalled Options		
	Age	35			05-01-2023 Cal Shared investment portfolio performance	Schedule Follow-up Call		
	Annaal Income	\$979,872	PL Expiration Personal Loan expiring on 27-01-2025 (6 days remaining)	▲		view all activity -		
	Month On Book							
	Client Segment	Employee Banking	CASA Balance Movement					
	Gender	Other	CASA balance Movement CASA balance has increased by 478.78%	A				
	Marital Status	Single						
	Country	france						
	RM Code	SaitTextfg						
	Customer Status	Active						
	Open Date	23-Dec-24						
	Product Overview							
	Product Holdings	C	Balance Information	血	Next Best Product Recommendation			
	Total Products: 5		Liability Salance Current Account Balance	\$1,519,693	Credit Card			
	Product Type	Status	Savings Account Balance	\$561,716	Reconviendation basis customer product take up propensity			
	Current Account	Active			Personal Loan			
	Savings Account	Aller	C Asset Balance Mortpage Balance	\$05,656.86	Recommendation basis customer product take up propensity			
	Mortgage	Arrive						
	investment	Active	🥓 Investment Balance	\$91,496.61				
	Impunence	Autow	Investment Balance	\$91,496.61				
	Credit Overview							
	1000000							
	750000-							
	500000-							
	250000-							
	Oredit Card Limit Savings Account I		Investment Balance Mortgage Balance					
		Credit						

	RM360									of Profil AL Razzan			
A Home	Hello, Al Razzaq												
Analytics Dashboard Next Best Product Customer Overview	Upcoming Meeting with Bran 1000 AM			0	Top Opportunities Customer 43 has opportunites in Sife insurance Petertia value 350,000		L Performance Sats \$89,000 ∿_€R, Core from Lat seet						
	200 Mr Fellow up with Client 400 Mr				Customer 27's capital wert up 30% Petersia vaus 313.000 Customer 12 withdrew stock gains Petersia vaus 125.000			🛅 List updated: Today at OROD A	м				
	Customer Det	ails											
	ID	Customer Name	Region	Products Owned	Amount	Engagement Status	Last Engagem	sent	Ongoing Tasks	Priority			
	1	RM-1	Riyadh	423	\$34,295	Completed	24-11-24		Life Insurance				
	2	RM-2	Jeddah	356	\$28,150	Processing	23-11-24		Investment Review	Medum			
	3	RM-3	Dammam	289	\$42,780	Rejected	22-11-24		Refirement Plan	(Los			
			Riyadh	512	\$56,420	Completed	21-11-24		Portfolio Review				
			Jeddah	178	\$19,845	Processing	20-11-24		Insurance Review	Medium			
			Dammarn	230	\$25,670	Processing	19-11-24		Loan Consultation	(Lee			
	7	RM-7	Riyadh	340	\$45,110	Completed	18-11-24		Credit Card Upgrade	Hat			





RM 360 : RM CockPit

	RM360										ሷ² ≈ Profil•
 Home Analytics Dashboard Next Best Product Customer Overview 		STATS Sales Target 657k Sales Achieved % 213.3% \$ CASA Sales 136k \$ Investment Sales 521k	 Hi Sa Give Base Thes 	me the custome d on the provide e customers are Customer ID 0 101,982 1 101,931 2 102,345	ome to RM CockPit! H ers under my portfol ed data, the followin e actively holding cree Customer Name Nader Al-Masri	iow can I help you too io having credit cards g customers under th dit cards and are part Customer Segment Priority General Mass Market Priority General Mass Market	e portfolio have c of the portfolio. Customer Status Active Active Dormant	Credit Card Limit Cre 741,421 960,188 121,805	ی ۹ ۲: edit Card Statement Balance 11,792.4 55,400.7 [No Title] 43,968.2 84,363.4		C Coroli A
	10.85M Investment Balance 0.73M	33 Personal Loans Sold 73		4 102,397 5 101,412 6 103,029 7 103,931 8 103,355	Sara Al-Majali Layla Al-Kurdi Tariq Abu Saleh Rami Abu Zaid Firas Al-Omari	General Mass Market Priority General Mass Market Premium Priority Private Employee Banking	Active Dormant Active Dormant Active	402,092 368,603 143,962 215,881 364,701 301,717 265,186	84,363,4 59,378 60,849,2 17,627,9 66,322,9 82,919,2 22,368,6		

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.