



# VeriTouch

## Banking CRM Solution



Add-on for

 Microsoft  
Dynamics 365



**Improve**  
Data Quality



**Reduce**  
TAT & Cost of Servicing



**Improve**  
Cross Sell Ratio



**Provide**  
Single View of Customer



**Improve**  
Sales Team Efficiency



**Reduce**  
Cost of Client Acquisition



**Improve**  
Marketing Efficiency



**Improve**  
Customer Experience

VeriTouch is a vertical solution built on top of Dynamics 365 that enables banks - retail, corporate, SME - to place customer relationship management at the core of their digital transformation journeys. It consolidates data from the organization's back-end systems and digital channels to provide a unified front end with standardized processes. The solution provides acquisition, development, retention and loyalty capabilities in an omni-channel architecture.

VeriTouch offers many role-based dashboards such as Relationship Manager Dashboard, Branch Manager Dashboard and Contact Center Agent Dashboard to provide valuable insights for the various departments of the banks. It strongly influences executive decision making and enables banks to monitor operations effectively.



RETAIL BANKING



CORPORATE BANKING



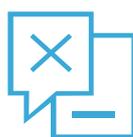
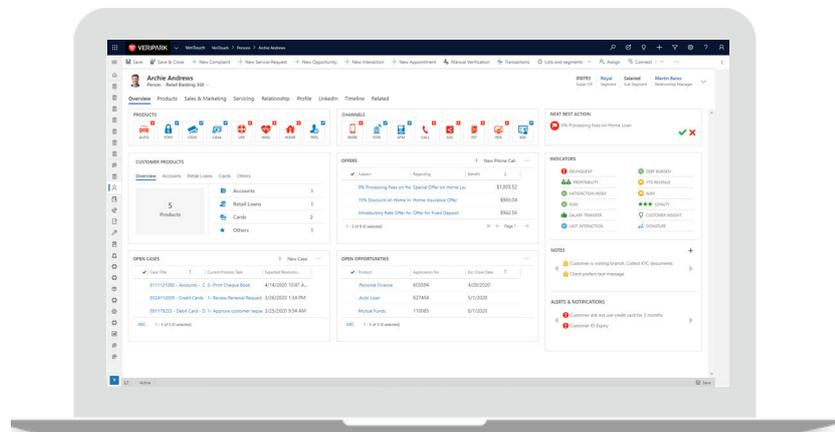
SME BANKING



## Single View of Customer

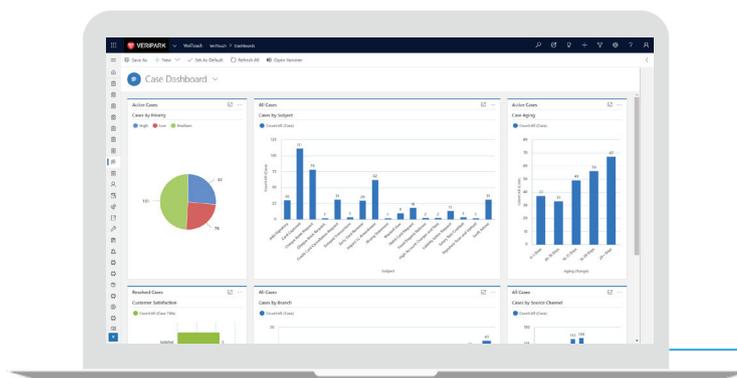
VeriTouch's Single View of Customer module brings together all of a customer's data across every channel and interaction point into one single source of detailed customer insight. The key features include:

- A consolidated view of all customer products, offers, opportunities and service requests
- Handling interactions with a customer easily with a set of visual indicators
- Displaying an overview of notes and activities associated with the customer in an interaction timeline
- Capturing new customer interactions and communications



## Complaints Management & Service Requests

This module offers operational excellence by providing automated processes for the resolution of complaints and service requests. Once a complaint or a request is captured, it's automatically routed to relevant back office queues for fulfillment. The module also offers following features:



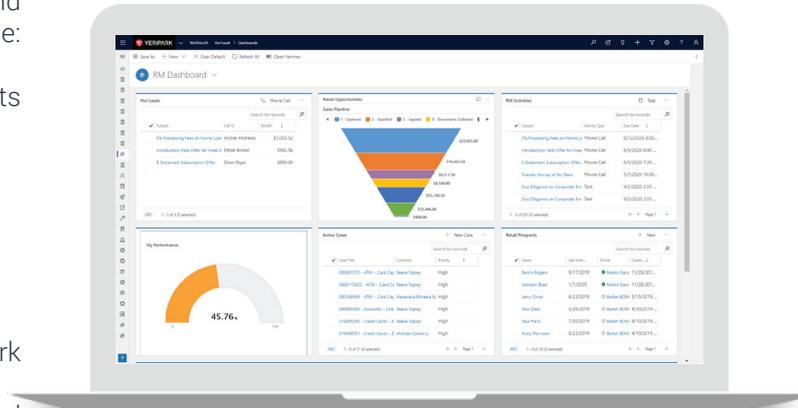
- Capturing complaint and service requests with structured entry of details
- SLA's and escalations on complaints, requests and resolution activities
- Segment, priority and channel driven routing and assignment
- Configuration driven resolution process stages for any type of complaint or service request
- Monitoring dashboard and reports



## Sales Management

The Sales Management module provides standardized and configurable sales processes that are specific to each and every product and line of business. The key features include:

- Automating the full sales cycle of different products from prospect stage to fulfillment
- Prospect capturing, assignment and conversion
- Prospect contact & qualifications SLAs
- Opportunity capturing, cross-sell & up-sell
- Opportunity routing, assignment, SLAs
- Configuration driven sales process steps for products
- Product catalog configuration
- Multi-channel sales process from direct sales network to branches
- Sales pipeline dashboard, performance monitoring and reporting



## Contact Center Automation

The Contact Center module automates inbound and outbound call handling, and empowers agents with access to Customer 360° view. The key features of this module include:

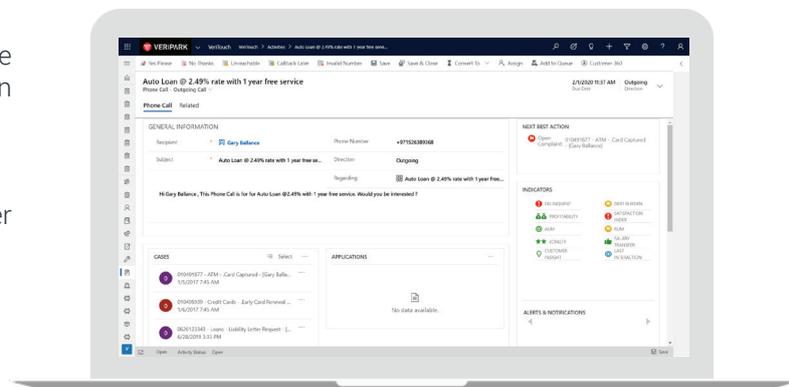
- Unified agent desktop, a single window solution for inquiries and transactions
- IVR/CTI integration for 360° pop-up
- Customer search ID&V
- Capturing product/campaign inquiries and leads and assigning them to branches and direct sales agents
- Capturing complaints and service requests
- Call wrap-up



## Marketing & Campaigns

This module enables financial institutions to manage the entire marketing campaign lifecycle starting from campaign creation to execution. The key features include:

- Campaign scheduling
- Generating target lists based on the customer segmentation
- Budget allocation and expense capturing
- Offering launch through digital and assisted channels
- Providing inbound & outbound support
- Capturing customer response
- Monitoring dashboards to see the progress and effectiveness of the campaigns
- Offer fulfillment





## Key Features



### Enrollment & Account Opening

- Document Packages & Capture
- Client Needs Assessment
- Blacklisting & AML Checks



### Single View of Customer

- Products & Channels
- Complaints & Requests
- Interaction History



### Master Data Management

- Static Info Update
- Data Quality APIs
- Core System Updates



### Sales Management

- Prospect Management
- Sales Pipeline Management
- Cross-sell & Up-sell Journeys



### Marketing & Campaigns

- Targeted List-based Offers
- Lead Distribution
- Offers on Digital Channels



### Complaints & Service Requests

- Capture across Channels
- Routing & Assignment
- SLAs and Escalations



### Contact Center

- IVR / CTI Integration
- 360 pop-up
- Unified Agent Desktop



### Retention & Loyalty

- Call Reports
- Retention Offers
- Loyalty Programs



### Corporate Banking

- Customer Enrollment
- Account Planning & Call Reports
- Corp RM Tablet Application

## References



## About VeriPark

VeriPark is a global solutions provider enabling financial institutions to become digital leaders with its Intelligent Customer Experience suite. With its main offices located in United States, United Kingdom, Europe, Asia, Africa and the Middle East, VeriPark is helping financial institutions to enhance their customer acquisition, retention and cross-sell capabilities by providing proven, secure and scalable Customer Relationship Management, Omni-Channel Experience, Branch Automation, Loan Origination and Next Best Action solutions.

### VeriChannel Omni-Channel Experience

- Mobile Banking
- Internet Banking
- Contact Center Banking
- Mobile Wallet
- Digital Onboarding
- Kiosk & ATM Banking
- Chatbot

### VeriBranch Branch Automation

- Teller
- Seller
- Advisor
- Universal Banker
- Unified Front End
- Digital Branch
- Signature Verification

### VeriTouch Acquisition, Retention, Cross Sell

- 360 / 720° Views
- Next Best Action & Customer Insights
- Sales & Prospect Management
- Marketing & Campaign Management
- Loyalty & Retention
- Complaints & Service Requests
- New Customer Enrollment

### VeriLoan Loan Origination & Servicing

- Retail Auto Loans
- Personal Loans
- Home Loans
- Credit Cards
- Commercial Loans
- Scoring & Servicing
- Digital Lending Portal