VERIPARK

VeriTouch
Banking CRM Solution

Add-on for

Microsoft Dynamics 365

powered by
Copilot & Role-Based Banking Agents

Recognized in Forrester's 2024 Financial Services CRM Landscape Report

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

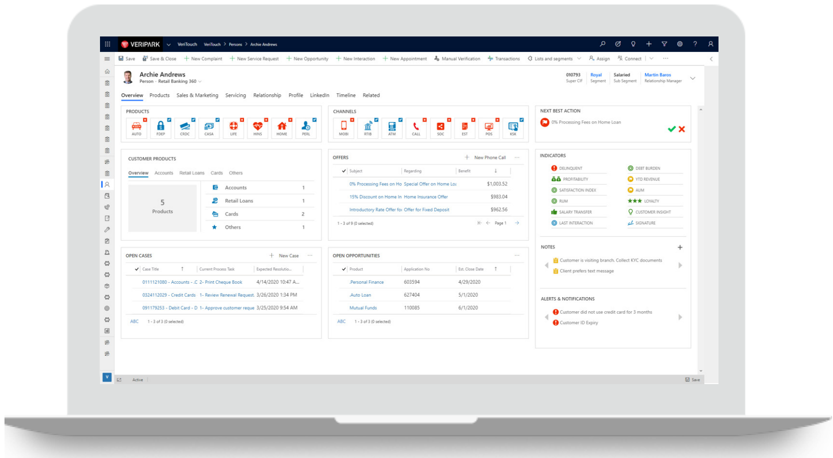
Improve
Customer Experience

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. It includes advanced capabilities such as Role-based Banking Agents for Retail and Corporate Banking Relationship Managers, along with Next Best Action recommendations. Role-based dashboards for Branch Managers and Contact Center Agents deliver actionable insights for different banking departments. VeriTouch also enhances executive decision-making by enabling banks to monitor and optimize operations.

Single View of Customer

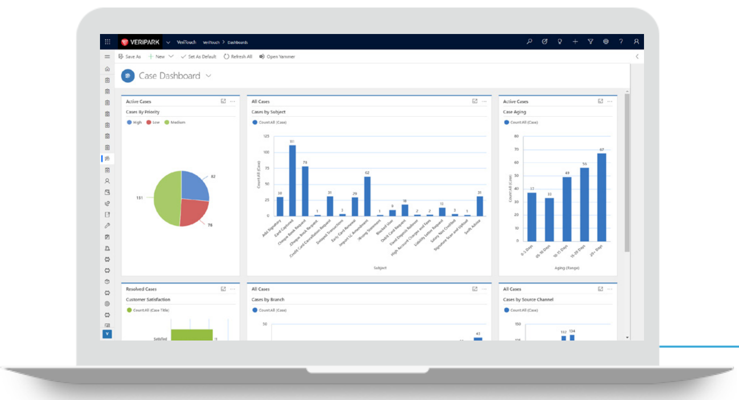
VeriTouch's Single View of Customer module brings together all of a customer's data across every channel and interaction point into one single source of detailed customer insight. The key features include:

- 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

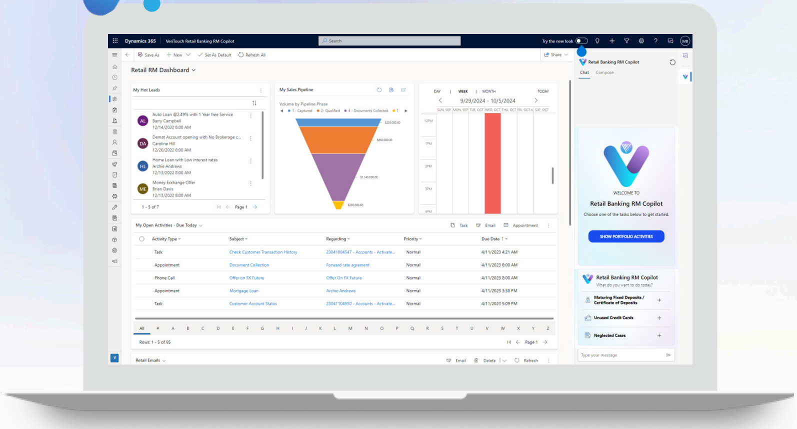
Sales Management

VeriPark's Role-based Agents tailored for financial services seamlessly integrate AI & ML into our VeriTouch Banking CRM solution:

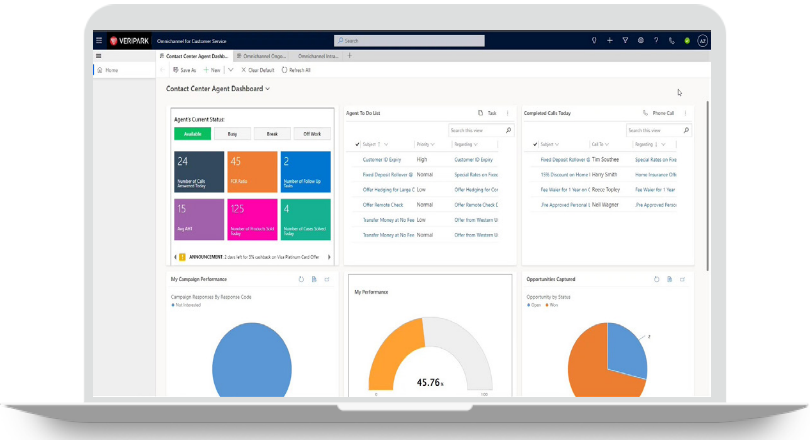
- Retail Banking Relationship Manager Agent
- Corporate Banking Relationship Manager Agent

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



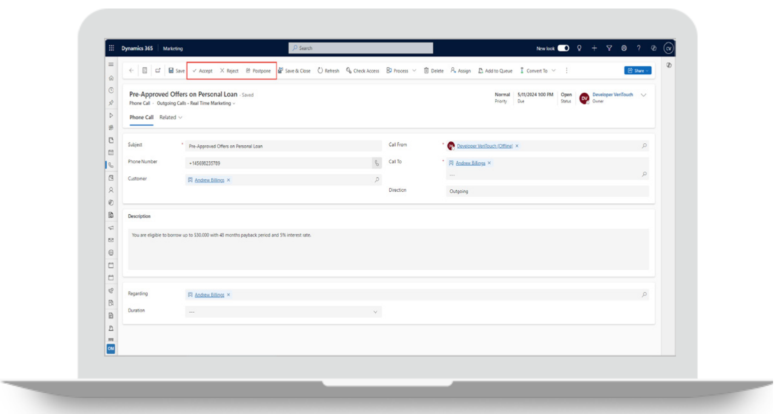
The Contact Center module automates inbound and outbound call handling, and empowers agents with access to Customer 360° view. The key features of this module include:

- 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
- Predictive targeting and proactive engagement
- Conversational AI (NLU, Speech–to-text, Text-to-speech, dialog)
- Self-service IVR and chatbots

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
- Capturing customer response
- Monitoring dashboards to see the progress and effectiveness of the campaigns
- Offer fulfillment
- AI Marketing Insights & Monitoring Dashboards



Key Features

Single View of Customer

- 360 & 720 Views
- Products & Channels
- Alerts & Notifications
- Interaction History

Sales Management

- Retail & Corporate RM Copilot
- Prospect and Sales Pipeline Management
- Performance Scorecard & Incentives
- Cross-sell & Up-sell Journeys

Marketing & Campaigns

- Targeted List-based Offers
- Real-time Event Triggers
- Digital Marketing Capabilities
- Offer Distribution to Digital Channels

Loyalty Management

- Multi-Step Campaigns
- Loyalty Reports
- Retention Offers
- Loyalty Programs & Gift Catalogue

Master Data Management

- Static Info Update w/ Workflows
- Maker/Checker Approvals
- Propagation of changes to core systems
- Version History & Snapshot Support

Complaints & Service Requests

- STP & Non-STP Service Requests
- Capture Across Channels
- SLAs and Escalations
- Routing & Escalations

Contact Center

- IVR / CTI Integration
- 360 pop-up / STP Transactions
- Unified Agent Desktop & Omnichannel Servicing
- Outbound Telesales Capabilities

Enrollment & Account Opening

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

Next Best Action & Customer Insights

- Product Propensity
- Churn Probability
- Probability to Default
- Generation of Actionable Insights

References

About VeriPark

VeriPark is a global solutions provider enabling financial institutions to become digital leaders by placing Customer Experience at the core of digital transformation. With an exclusive focus on FSI, VeriPark's Intelligent Customer Experience suite delivers world-class customer journeys on digital and assisted channels.

With its main offices located in the United Kingdom, Europe, North America, Asia, Africa and the Middle East, VeriPark helps financial institutions to enhance customer acquisition, retention and cross-sell capabilities. Their proven, secure, and scalable solutions cover Customer Engagement, Omni-Channel Delivery, Branch Automation, and Loan Origination.

VeriChannel
Omni-Channel Experience

- Digital Onboarding & Offboarding
- Mobile Banking
- Retail Online Banking
- Corporate & SME Online Banking
- Tablet Banking
- Contact Center Banking
- Innovative Channels

VeriBranch
Branch Automation

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

VeriTouch
Acquisition, Retention, Cross Sell

- New Customer Enrolment
- 360° / 720° Views
- Customer Insights, NBA and AI Copilots
- Sales & Prospect Mgmt.
- Marketing, Campaign and Loyalty Mgmt.
- Contact Center Automation
- Complaints & Service Request Mgmt.

VeriLoan
Loan Origination & Servicing

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

info@veripark.com
www.veripark.com