

Wipfli **Connect** FOR BANKING

Banking is a relationship business. Leverage a customer relationship management (CRM) tool that works the way you do.

Wipfli Connect for Banking is a unique and powerful relationship management tool.

But it's also much more than that.

Built on Microsoft Dynamics® CRM, it's a solution tailored to the banking industry. And it is made to work the way you already work—leveraging all the other Microsoft tools your team is already using. **35%**



Wipfli Connect for Banking gets everyone on the same page to ensure the efficiencies you need now and the customer loyalty you want now and always.

- Drive noninterest income
- Maintain or improve margins
- Identify and leverage most profitable relationships
- Improve cross-sell referrals
- Grow market share
- Delight customers with exceptional service across all touch points

Customer relationship management has never been more critical to the continued success of any financial institution. Many core assumptions in the financial services marketplace have come into question, and the extraordinary uncertainty within our industry continues to dominate headlines. That said, many institutions are thinking about a rebirth in strategy as they get back to the basics and focus on their core business model. As you approach your forthcoming strategic initiatives, customer relationship management will be a key component and an ever-critical component of thinking through maintaining margin, improving noninterest income, and gaining efficiencies across business lines and branches.

Wipfli Connect for Banking creates one simple-to-use interface across all lines of business and branches, allowing you to effectively manage customer information, improve customer service, and keep everyone up to date on every customer interaction. It provides visibility into referrals, sales opportunities, customer life events, products, account balances, and next best offers. It is a central point of view that consolidates information from a lot of disparate systems including your core processor, mortgage, investment, and insurance systems.

WIPFLI^{LLP}
CPAs and Consultants

www.wipfli.com



Improve processes and gain efficiencies. One consolidated view of customer information lets you improve workflow by automating manual tasks, eliminating duplicate data entries, and streamlining processes across functions in the bank.

Increase retention and cross-selling opportunities, while building a sales culture.

By centrally tracking all customer information, your organization gains timely insights into customer-specific needs, helping staff and relationship managers identify the right products and services to offer while delivering relevant, customer-focused communication.

Enhance customer service. Complete information on every customer is in one central, easily accessible place, helping you deliver quality, personalized service with every interaction.

Optimize customer retention. Comprehensive workflow and case management capabilities ensure every communication opportunity is tracked through its life cycle, so you never miss an important touch point with any customer.

Streamline communication flow. Create visibility across lines of business to holistically service your customers.

Enhance customer service and build customer trust with better insights. Wipfli Connect for Banking turns data into actionable information and gives you—and everyone in your financial institution—a clear view of accurate and comprehensive customer information.

It uses Microsoft Dynamics® CRM as a platform while working seamlessly with Microsoft Outlook® to build on business applications you're already familiar with. It lowers the learning curve and gives your financial institution a familiar platform to grow your institution.

Leverage comprehensive customer intelligence and put more flow into your workflow. Greater efficiencies lead to greater customer service. Wipfli Connect for Banking lets you increase productivity and improve the customer experience. It integrates marketing,

sales, and service functions to provide each member of your customer service team easy access to up-to-date and accurate customer information. Wipfli Connect for Banking provides a centralized customer view, letting you put valuable customer data quickly in the hands of those who need it. Your staff can easily access any customer profile along with a complete relationship and account history.

You also gain additional efficiencies through workflow automation and streamlined processes to help your financial institution focus on key responsibilities that impact the customer experience. The result is a truly customer-centric financial institution with better-equipped customer service representatives, reduced operating costs, and enhanced service delivery.

Maintain customer loyalty. Obtain new customers. With a 360° view of each relationship, Wipfli Connect for Banking lets you track customer contacts centrally to create meaningful marketing communications that engage your existing customers and strengthen your relationships. Automated and customizable, it lets you maximize opportunities to cross-sell customer-specific products and services and manage the customer experience with ease.

You can also track leads and referrals easily and ensure new opportunities are pursued in a timely manner. Prospective information can be maintained for any future sales and marketing outreach campaigns.

Enhance your ability to manage your customer relationships, and enable your associates and your customers to clearly see what your financial institution has to offer. Create a focus on the target markets you want to excel in with tools that help you achieve your growth goals.

Comprehensive. Collaborative. Customer Service. That is Wipfli Connect for Banking.



Microsoft Partner

Gold Customer Relationship Management

For more information about Wipfli Connect for Banking, visit
www.wipfli.com/wipfliconnect

WIPFLI LLP
CPAs and Consultants