

# Nomis Deal Manager

Nomis Deal Manager for Retail Banking empowers front-line banking employees to deliver real-time personalized pricing and offers to customers across multiple channels, including branches, call centers, brokers, and other field advisors. A cloud-based offer presentment and pricing execution software application, Nomis Deal Manager seamlessly deploys complex offer and pricing strategies to front-line bank representatives in an easy-to-use UI. This empowers representatives to help customers select products such as residential mortgages, deposits, and personal lending.




## Unique Capabilities

With Nomis Deal Manager, banks can automatically update rates from a centralized location and deliver them to front-line employees in the context of individual customer interactions. The system also captures data about customer interactions and makes it available to the pricing desk to create an iterative, closed-loop offer presentment and pricing process that becomes increasingly valuable over time.

## Make smarter offers and decisions with data-driven insights

Nomis Deal Manager lets front-line employees know what offers they are authorized to make based on customers' likely responses and provides management visibility into customer interactions.

## Benefits

-  Increase take up rates by empowering front-line line employees to provide superior service with a single view of the customer, including approved offers, competitive or previous offers, and exception workflows.
-  Improve profitability by delivering insights and incentives to front-line employees that drive deeper, more consultative customer interactions while maximizing offer and price performance at the individual, branch, or universal level.
-  Drive better decision-making with visibility into all customer offers and their outcomes, analyze the impact on portfolio growth and profitability, and create a mechanism to monitor employee performance.

- View competitive offers, previous in-bank offers, and the status of any outstanding offers for a complete view of the customer decision process.
- Provide immediate access to data that incentivizes sales and reduces lost offers, such as team/individual performance, deal commission/profitability, and personalized pricing.
- Compare and contrast several different offers simultaneously to allow front line advisors to react “on-the-fly” to new information from the customer or to adjust the offer if rejected.

## Respond to customer inquiries faster with real-time offer intelligence

By efficiently managing pricing discretion, the Nomis Deal Manager enables banks to identify underperforming branches, regions, market segments, and products and meet volume and profitability targets in a closed-loop, end-to-end pricing execution process effectively halting unnecessary revenue leakage.

- Present front-line employees with clear pricing guidelines based on price sensitivity and other customer-specific data.
- Automate, manage, and provide alerts for exception approval workflow and approval of personalized offer terms (such as extending rate expirations).

- Generate personalized rates automatically with dynamic pricing functionality that leverages information collected by front-line advisors about customer needs to adjust the product or offer.

## Realize better results with end-to-end visibility

Banks can implement Nomis Deal Manager within the context of the existing applications front-line employees already use, complete with the bank’s own corporate branding. As a result, it requires virtually no training to begin collecting and using data about offer history to build a closed-loop offer presentation and pricing process.

- Manage multiple offers for a single customer or opportunity to foster deeper customer discussions about offers for different product options (e.g., cashback) and bundles as well as different rates.
- Evaluate the performance of products, regions, and employees with role-based dashboards that display customized operational and management KPIs.
- Track all offer history, including accepted rates and lost quote details, analyze why customers failed to convert.

## More Information

Nomis Deal Manager is part of the Nomis Pricing and Profitability Management™ suite, which includes Nomis Price Optimizer™. Nomis Price Optimizer uses big data analytics to help banks define strategies to meet specified targets volume and profitability.

Designed to work seamlessly together, Price Optimizer and Deal Manager support end-to-end visibility that links back office pricing decisions to front-line customer engagement.



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## About Nomis

Nomis is a fast-growing FinTech focused on ensuring on-going value creation for the world's smartest financial institutions through optimized, end-to-end, customer-centric pricing capabilities. Institutions of all sizes leverage Nomis' unparalleled domain expertise and their market-leading Nomis Platform™ to operationalize cutting-edge Big Data and AI to understand and anticipate customer demands, competitor actions, and market dynamics.

Nomis has a proven track record of increasing customer and stockholder value, returning nearly \$800 million to its partner banks every year.

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