



CRMNEXT FOR CREDIT UNIONS

Seamlessly integrating with your core and all other systems, CRMNEXT provides work simplification, robotic automation and immediate results for both team and members. The codelessly configurable platform removes complexity from transforming the member experience across both assisted and digital channels - recalibrating the potential for financial institutions to grow productivity, assets, profitability, service and innovation.

CHOOSE THE EDITION THAT IS RIGHT FOR YOU

SMART START

Level the playing field using flexible technology and CRM integrated with your core platform. Right-sized for institutions over \$300 million in assets, Smart Start provides the foundation needed to unify member information, manage opportunities and accurately track improvements in sales and service operations.

Key Issues Addressed

- Time-consuming processes and manual team tracking create lag that prevents accurate view of sales pipeline and activity
- Siloed member information and disjointed processes with multiple handoffs lead to poor member experience
- Lack of work simplification and service automation results in too many missed service-to-sales opportunities

ACCELERATED GROWTH

Ideally suited for institutions over \$1 billion in assets looking to increase share of wallet and share of market. Accelerate asset and deposit growth, expand up-sell and cross-sell, and transform onboarding and service operations.

Key Issues Addressed

- Lack of automated follow-up results in expensive leads being dropped
- System fragmentation and lack of automation introduce inaccuracy and waste employee time with screen-hopping and duplicate data entry
- Asset growth hampered by onboarding complexity and basic one-size-fits-all marketing campaigns

EXPERT ENTERPRISE

Maximize the potential for scale and efficiencies in larger institutions coping with the complexity of broad product offerings and distributions channels. Unlock innovation and productivity gains, expand self-serve / digital capabilities and transform your member experience.

Key Issues Addressed

- Hyper-growth is limited by constraints of process efficiency, team productivity and organizational complexity, requiring AI/machine learning-led intelligent products to reach next level
- Lack of automated processes and audit trails contributes to higher compliance risks
- Structural bottlenecks and current technology to overcome them require costly core banking upgrades

SMART START



CRM

- Lead Management
- Campaign Management
- Pipeline Management
- Case Management

ACCELERATED GROWTH

Includes all of Smart Start, plus:

- Referral Management
- Trinity Cross-sell Modeler™ for micro-segments & personalized campaign offers
- AI-driven prediction of next-best products to offer member
- Multi-level & multi-wave campaigns

EXPERT ENTERPRISE

Includes all of Accelerated Growth, plus:

- Catalyst Performance Modeler™ for peak team activity & optimal productivity
- Individualized intelligent planning
- Compensation scorecards based on actions
- Cross-org visibility & leaderboards
- Mobile access on-the-go
- Social 360 & sentiment analyses



MEMBER MANAGEMENT

- View & Do: Unified member info & service automation
- Two-way Member 360
- Member Action Center and profiling
- Keep-in-touch member communications
- Two-way Account (Product) 360

- Advanced onboarding & account management
- Single-screen account opening (branch)
- Advanced case management
- Voice of member surveys
- Advanced Member Action Center

- Digital self-service via VIVID
- Design Studio™
- Omnichannel account opening
- Advanced account management (e.g. automated credit line increase, GL Accounting)
- Knowledge management
- Intelligent product creation



ANALYTICS

- Wide set of standard reports that are automatically generated & easily configured

- Action-oriented dashboard views
- Advanced reports customizable to your needs (Target vs Achievement)

- Integrated multi-dimensional analysis engine
- Advanced business rules decision engine
- AI-based algorithmic analysis across data sets to unlock actionable insights
- Compliance connector with RAG status
- Member profitability analysis



EMPLOYEE DASHBOARD

- Calendar
- Appointments
- Tasks
- Alerts and notifications

- Manuals and documents
- Target vs. achievement
- News feed

- Manuals and documents
- Target vs. achievement
- News feed



INTEGRATION

- Out-of-box integration with your core system

- Additional connectors in place
- Digital docs (eg. Wolters Kluwer)
- eSignature
- Identity verification & KYC

- Open-ecosystem service architecture for advanced automation & RPA support
- Autonomia Integration Designer™ for real-time integrations with zero coding
- CTI/Call Center Integration