



Retail and Commercial Banking

Maximize the value of customer information by sharing it throughout your organization to build new relationships and strengthen existing ones



Without a centralized system that provides a single view of your customers, valuable information is lost:

- Consolidate information from disparate systems and integrate workflows to effectively manage customers interactions
- Identify and manage targeted cross sell and up sell opportunities using analytics to better serve customers
- Evaluate “at risk” customers to turn non-profitable ones into profitable ones

Challenge:

The banking industry is undergoing a rapid transformation, and the pace of change has recently accelerated due to economic uncertainty. When this transition ends, the U.S. banking industry will be less fragmented and highly consolidated.

Major banking industry sectors will change and ongoing consolidation will continue to occur. As changes unfold, traditional banking enterprises will also have to respond to attacks from non-traditional service providers offering attractive alternatives in payment methods and channels, investment programs, and lending solutions. And the impact of non-traditional service providers will continue to grow as consumers become more comfortable using social technology.

Industry leaders recognize that difficult times require aggressive business-building strategies. Meeting the evolving needs of individuals and small businesses is critical. The focus will continue to be on improving the customer experience as one element of a plan to retain current customers and attract new ones. Additionally, the industry recognizes the pivotal role filled by customer contact employees to successfully execute these plans. At a minimum, it is necessary to improve the employee experience by providing new technologies that are consistent with existing technologies that they are already comfortable using, and by providing the tools required to effectively respond to customer needs.

To stay competitive, fragmented regional and community institutions, including credit unions, will have to shift their focus from solely pitching products to establishing themselves as relationship-driven organizations offering targeted products and services from customers in order to differentiate themselves and remain profitable.

About Us

Green Beacon Solutions partners with clients to implement integrated financial, supply chain, sales automation, and marketing business solutions built on proven Microsoft technologies. Our unique combination of technology, people, and process quickly help identify and implement expert strategies that support our client's business objectives within the distribution, professional services, banking/banking services, and manufacturing industries.

Why Green Beacon?

Our technology and consulting expertise, combined with our success in solving customer issues, have resulted in our unmatched industry reputation. We have an outstanding track record developing, delivering, and integrating ERP, CRM BI and Marketing Automation technology solutions that deliver direct business benefits for our customers.

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Solution:

Retail and commercial banks typically use customer relationship management (CRM) systems for prospect and client management functions that are not typically included in standard transactional systems.

Successfully integrating CRM with existing customer platforms—retail banking and account management systems, investment and portfolio management, and mortgage origination solutions—delivers a holistic view of customer interactions which enables banks to offer targeted services. The end-result is that banks are quickly transformed from “product-driven” institutions to customer “relationship-driven” service organizations.

Why Green Beacon?

Green Beacon Solutions has worked in the financial services sector since 2001. Founded by a team of service professionals with years of experience working with leading retail and commercial institutions, we have successfully implemented CRM solutions that enable clients to better manage existing customer interactions and quickly develop prospects into long-term, satisfied customers. Our solutions help banks pinpoint key relationships, manage at-risk customers, improve product cross selling, leverage referrals, and promote effective targeting of clients with relevant services across business lines.

Know your Customer

- Centralize customer information by integrating disparate systems to gain a complete view of customers
- Provide broader access to critical customer demographics (i.e. total assets under management, average balances etc.) to make intelligent decisions about potential cross-sell and up sell opportunities.
- Enable access to financial accounts summary to determine “at risk” customers.
- Better understand customer relationships, households, account coverage to offer targeted customer service

Grow your Business

- Leverage information to drive internal referrals
- Implement standard call reports and defined sales processes to improve effectiveness
- Define workflows based on your business to increase efficiencies, reduce errors, and avoid redundancies.

Maintain Microsoft Dynamics AX with Green Beacon's

SmoothSail Managed Services

- Dedicated support staff at our Newton, MA HQ
- On-demand and cost-effective management services for CRM and ERP applications
- Advisory services to increase business efficiency by improving system usage
- Support and maintenance services to reduce down-time and ensure productivity so that systems operate at high availability



GREEN BEACON SOLUTIONS

- Established in 2001
- Headquartered in Boston, Massachusetts
- Offices in New York, Philadelphia, and Houston
- Specialists in Microsoft Dynamics Business Solutions
- ERP and CRM Consulting Services
- CompassPoint Solution Software Accelerators
- SmoothSail Support & Managed Services

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