.NETIKS
THE E-BUSINESS ARCHITECTS

Microsoft Dynamics

CONSOLIDATION OF CUSTOMER INFORMATION LEADS TO A DEEP UNDERSTANDING OF CUSTOMER PREFERENCES

To compete for the growing number of investors and investible assets, financial institutions must go beyond delivering exceptional service.

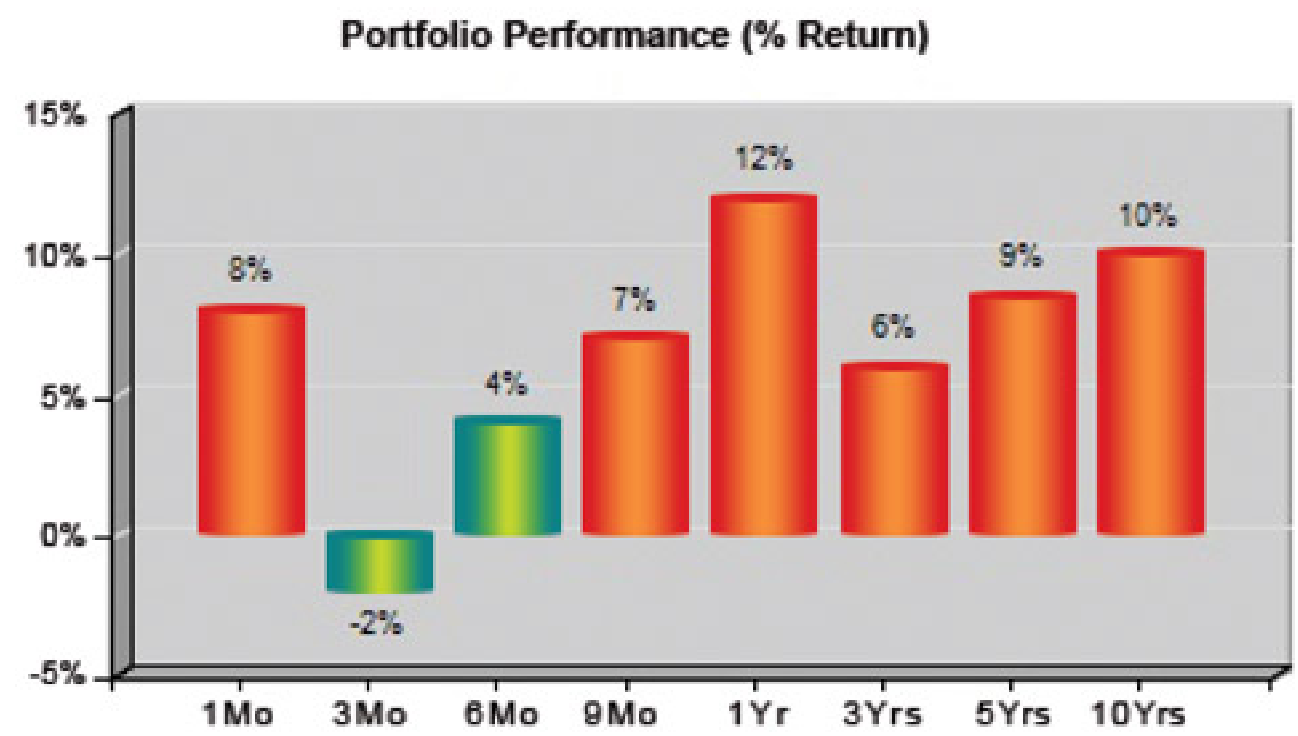
Advisors must understand the customer's entire portfolio and build relationships that span family households, banks, asset managers, accountants, tax consultants, and family offices; they need to reduce investor confusion by drawing a clear picture of the investor's retirement, investment, education, estate, and cash management goals.

Equally important, they need to demonstrate how each investment is performing against those goals. At the same time, firms must track market events that will impact each client's portfolio and collaborate in real time with investors impacted by market changes.

Netiks can help you get the best out of Microsoft Dynamics CRM to:

Analyze/Segment your customer portfolio to leverage sales opportunities

- Identify, develop, and retain profitable customers
- Detect customer churn
- Identify unmet customer needs
- Suggest alternative investments based on the client investment history, interests, and other valuable information
- Increase 'share of portfolio' and build a long-term client relationship



Organize Marketing campaigns

- Budget , execute, and monitor all campaign actions from a central place
- Target the campaign marketing list using specific criteria
- Capture campaign responses, track ROI and generate campaign performance reports

Deliver exceptional personalized customer service

- Streamline order process
- React quickly to customer needs and market changes
- Respond quickly to customer inquiries
- Improve efficiency across branch offices
- Unify customer interactions

Asset Allocation

Asset	Total %	1 Yr %	5 Yrs %	10 Yrs %	Health
Alternative Investments	10	5.4	8.2	7.6	Green
Mutual Funds	40	4	3	3.5	Yellow
Cash and Cash Equivalents	5	7.4	9	16.5	Green
Equity	30	1	6.2	5.5	Red
Fixed Income	15	12.3	8.2	15.8	Yellow

Client Satisfaction

Factor	Rank	Factor	Count
Customer Service	Yellow	Open Issues	4
Portfolio Performance	Green	Communications	15
Product Offerings	Yellow	Security Choices	10

Gain a 360-degree view of the customer

- Have a comprehensive view of customer profiles (Personal and professional information, portfolio holding, transaction history, and full picture of investment background)
- Real-time performance report on portfolio holdings
- Real-time view of client information across multiple delivery channels

TO RECEIVE FURTHER DETAILS OR REQUEST A FULL PRESENTATION PLEASE CONTACT Netiks

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