



# LEAD MANAGEMENT

Uniting member data all in one place with CRMNEXT will streamline your lead management process from start to finish. Let us show you how.

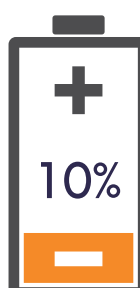
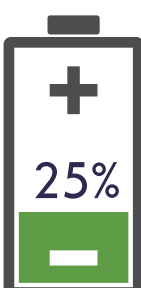


“ If people like you, they’ll listen to you. But if they trust you, they’ll do business with you. ”

- Zig Ziglar, Author, Salesman, and Motivational Speaker

Only **25%** of financial institutions are confident in their ability to personalize customer engagement.

Source: Bottomline/The Financial Brand Survey, Aug 2020



Companies that automate lead management see a **10%** or greater increase in revenue within 6-9 months.

Source: Gartner

## Stop losing leads. There's a better way.

Is your organization able to see what you need all in one place? Or are you screen hopping and losing leads to stacks of sticky notes?



Only **6%** of banks have a single source of trusted and related customer information across all businesses and systems, impacting their ability to make informed upsell and cross-sell offers.

(Capgemini, World Retail Banking Report 2021)

It's no secret, to survive and sustain in today's digital world, financial institutions need to bolster technology investments and speed-up modernization initiatives to reduce cost-to-acquire and cost-to-serve members.

Many credit unions desperately want to compete on relationship management and member experience, but unless you're a clear digital leader, it's going to get harder and harder to win that battle (McIntyre, Alan. Accenture, 2021, Accenture Banking: Top 10 Trends for 2021, Elastic Bands and Slingshots).

But to fully realize the digital promise in the front office, CUs have a whole lot of options... However, not all solutions are created equal. Too many "solutions" aren't built with Credit Unions in mind, or are so complicated that many organizations wonder, "why bother?"



"Following up with leads within **5 minutes** makes you **9x more** likely to convert them"

- Insidesales.com



## Here's How CRMNEXT Can Help

CRMNEXT captures leads from multiple channels, bringing them into one central platform.



Auto-assignments, qualification scripts & customized workflows ensure **NO LEADS ARE DROPPED**



Our platform tracks lead status and associated activities, alerting your employees of progress along the way



If a lead isn't ready to purchase yet, it will be funneled into a marketing campaign to nurture



If a lead gets stuck or needs attention, the lead is escalated & a manager is alerted



Once a lead is converted into a new customer, the process is easy & efficient with our end-to-end account onboarding that **REDUCES YOUR ACCOUNT OPENING TIME FROM 45 MINUTES TO LESS THAN 10**

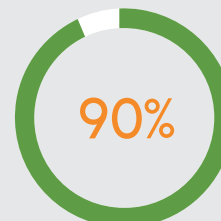
## CRMNEXT Transcends



Capture **100%** of info from all systems in Member 360



Eliminate **60%** of manual tasks through automation



Resolve cases **90%** faster - the first time

Simplify Work. Drive Growth. Deliver on Experience.

