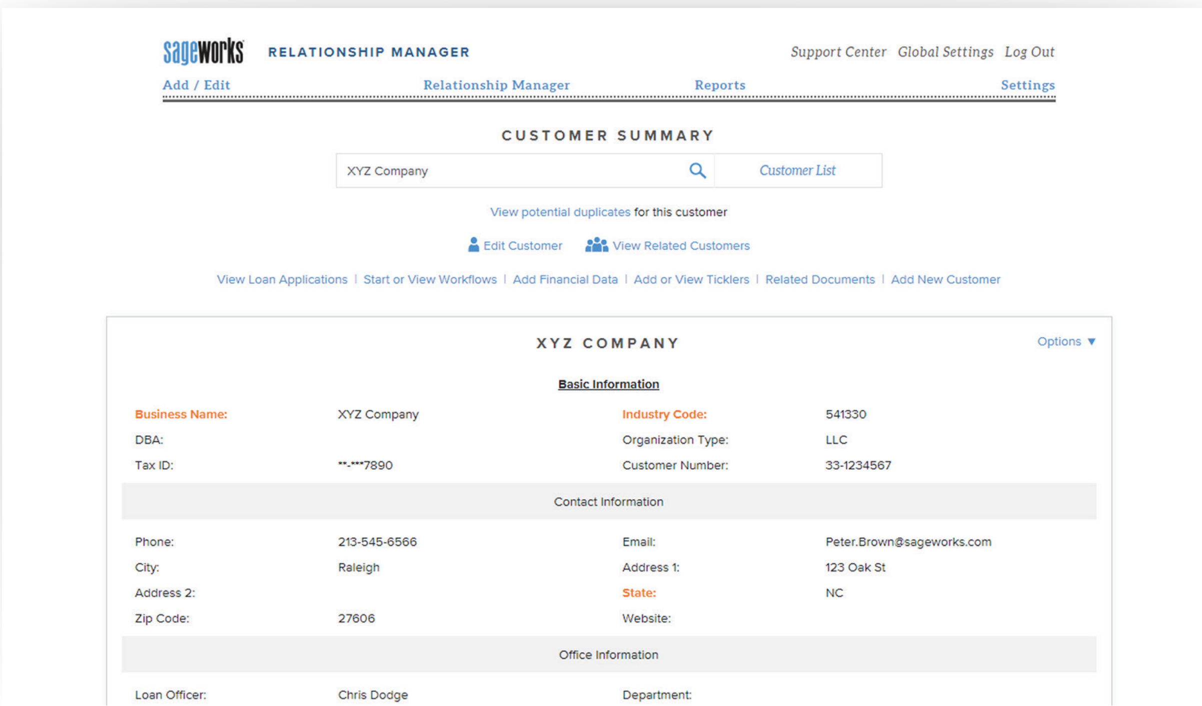
Sageworks Relationship Manager

Increase transparency into customer relationships

Avoid the challenge of managing customer and potential-customer relationships through spreadsheets, email logs, calendar invites and other notes. Banks and credit unions use Sageworks Relationship Manager to optimize performance and speed in the lending department. Alongside other Sageworks solutions, Relationship Manager uniquely aggregates all customer information into a 360° view of each customer and loan.

With Sageworks Relationship Manager, institutions provide high-quality service, manage risky customers and build accurate forecasts.



FOR LENDERS

- ✓ Complete, 360° view of customers and loan data
- ✓ Identify potential cross-sale opportunities
- ✓ View relationships between different borrowers
- ✓ Log activities and opportunities to keep track of progress with borrowers
- ✓ Receive notifications when activities are due

FOR MANAGEMENT

- ✓ Complete, 360° view of customers and loan data
- ✓ Report on daily activities performed by the lending staff
- ✓ Quickly see pipeline along with probability of closing and close dates
- ✓ Identify business development trends for the institution

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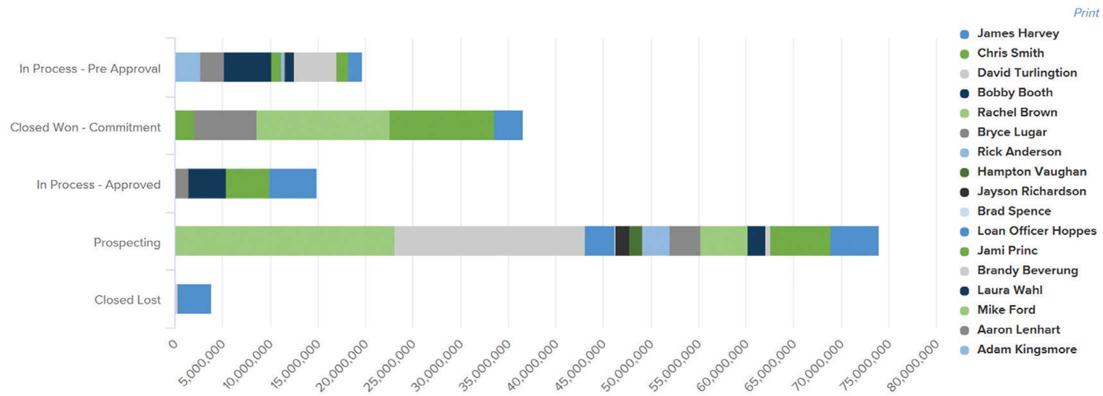
866.603.7029

info@sageworks.com

OPPORTUNITY AMOUNT BY STAGE



OPPORTUNITIES

Opportunity Name	Amount	Type	Assigned	Stage	Referred By	Probability of Close	Estimated Close Date	Last Modified Date	Created Date	Comments
C&I	$1,500,000.00	Loan - C&I	James Harvey	In Process - Pre Approval		95.00%	05/06/2015	01/30/2017	01/30/2017	
CRE	$3,000,000.00	Loan - CRE	James Harvey	Closed Won - Commitment		100.00%	05/11/2016	01/30/2017	01/30/2017	

KEY BENEFITS

360° Customer Profile

- Leverage a 360° profile of customers and loans
- High-quality customer service with consolidated records and increased responsiveness
- Personalized service to best customers
- Monitor risky relationships
- Accurate, up-to-date pipelines for prospect and deal tracking
- Cross-sell, upsell

Loan Pipeline & Risk Management

- Sales and activities planning among lenders and business development staff
- Exceptions tracking
- Integrated data
- Advanced analytics and reporting
- Portfolio risk management

Efficiency, Consistency & Customization

- Minimize administrative tasks with automation
- Increased accountability and consistency
- Notifications for upcoming tasks and outstanding activities
- Inter-department data tracking
- Customizable fields to fit each financial institutions' unique needs

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