

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.

The screenshot displays the Sageworks Relationship Manager interface. At the top, the logo and navigation links (Support Center, Global Settings, Log Out) are visible. Below the navigation, there are tabs for 'Add / Edit', 'Relationship Manager', 'Reports', and 'Settings'. The main content area is titled 'CUSTOMER SUMMARY' and features a search bar with 'XYZ Company' entered. Below the search bar, there are links for 'View potential duplicates for this customer', 'Edit Customer', and 'View Related Customers'. A secondary navigation bar includes links like 'View Loan Applications', 'Start or View Workflows', 'Add Financial Data', 'Add or View Tickers', 'Related Documents', and 'Add New Customer'. The main data section is titled 'XYZ COMPANY' and is divided into three sections: 'Basic Information', 'Contact Information', and 'Office Information'. Each section contains key data points for the customer.

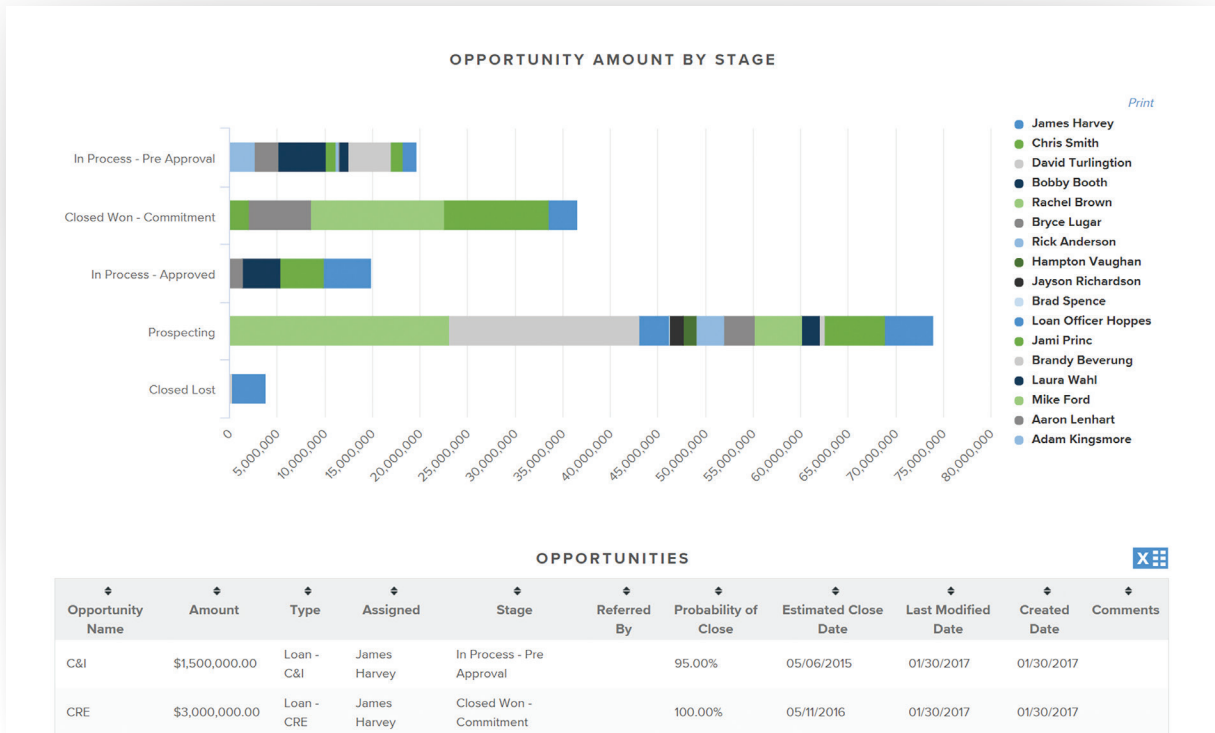
XYZ COMPANY			
Basic Information			
Business Name:	XYZ Company	Industry Code:	541330
DBA:		Organization Type:	LLC
Tax ID:	***7890	Customer Number:	33-1234567
Contact Information			
Phone:	213-545-6566	Email:	Peter.Brown@sageworks.com
City:	Raleigh	Address 1:	123 Oak St
Address 2:		State:	NC
Zip Code:	27606	Website:	
Office Information			
Loan Officer:	Chris Dodge	Department:	

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



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