# 3 Reasons Bankers Consider a CRM

With the right customer relationship manager, financial institutions can improve customer experience, increase lender productivity, boost portfolio growth and create efficiencies throughout their organization.

Inefficient Lending Process

- Delayed document gathering and missing information

- Prolonged paperwork and data-entry

- Unable to obtain accurate or prompt data
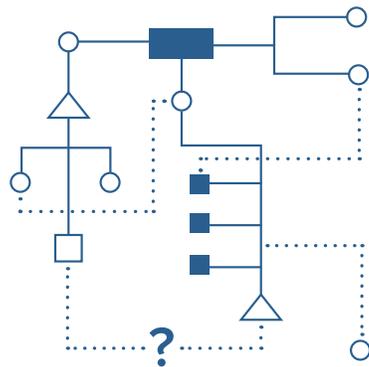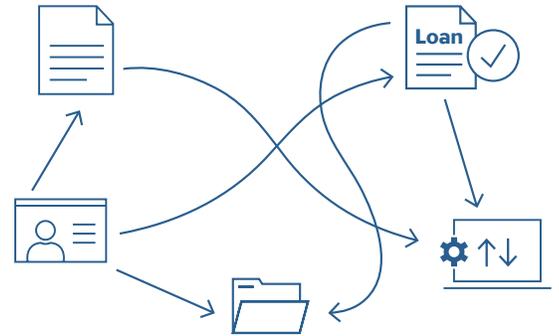
Disconnect Between Departments

- Inconsistent information between teams

- Tasks are unclear, causing missed opportunities and deadlines

- Failure to follow-up on tasks before a deal is lost

Losing Track of Customers

- Cross-sale opportunities not maximized

- Risky relationships not properly monitored

- Best clients not given adequate, personalized service

sageworks

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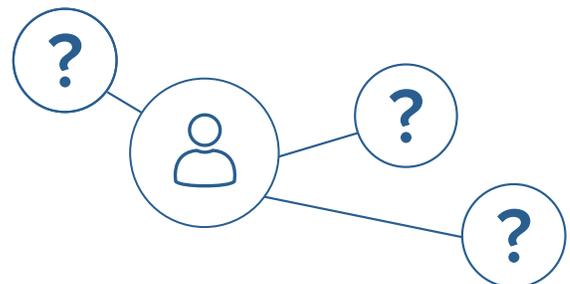
Lending is all about relationships

Every banker knows that relationships are the most important piece in building a portfolio. So, why not spend time fostering, growing and retaining your customer base?

Sageworks Relationship Manager is a platform for bankers seeking a complete, 360° view of each customer. It is a centralized, customizable interface within the Sageworks solution, and a competitive tool for lenders to leverage faster, better data. By pulling in data from the Sageworks system and the bank's core, it gives a comprehensive summary of the borrower, their loan information, their business relationships as well as pipeline activities and opportunities.

The real-time, aggregated data enables lenders and analysts to more effectively service their customers, report on the institution's lending pipeline and consistently build forecasts. Further, it allows for cross-departmental access to accurate customer data, instantaneously.
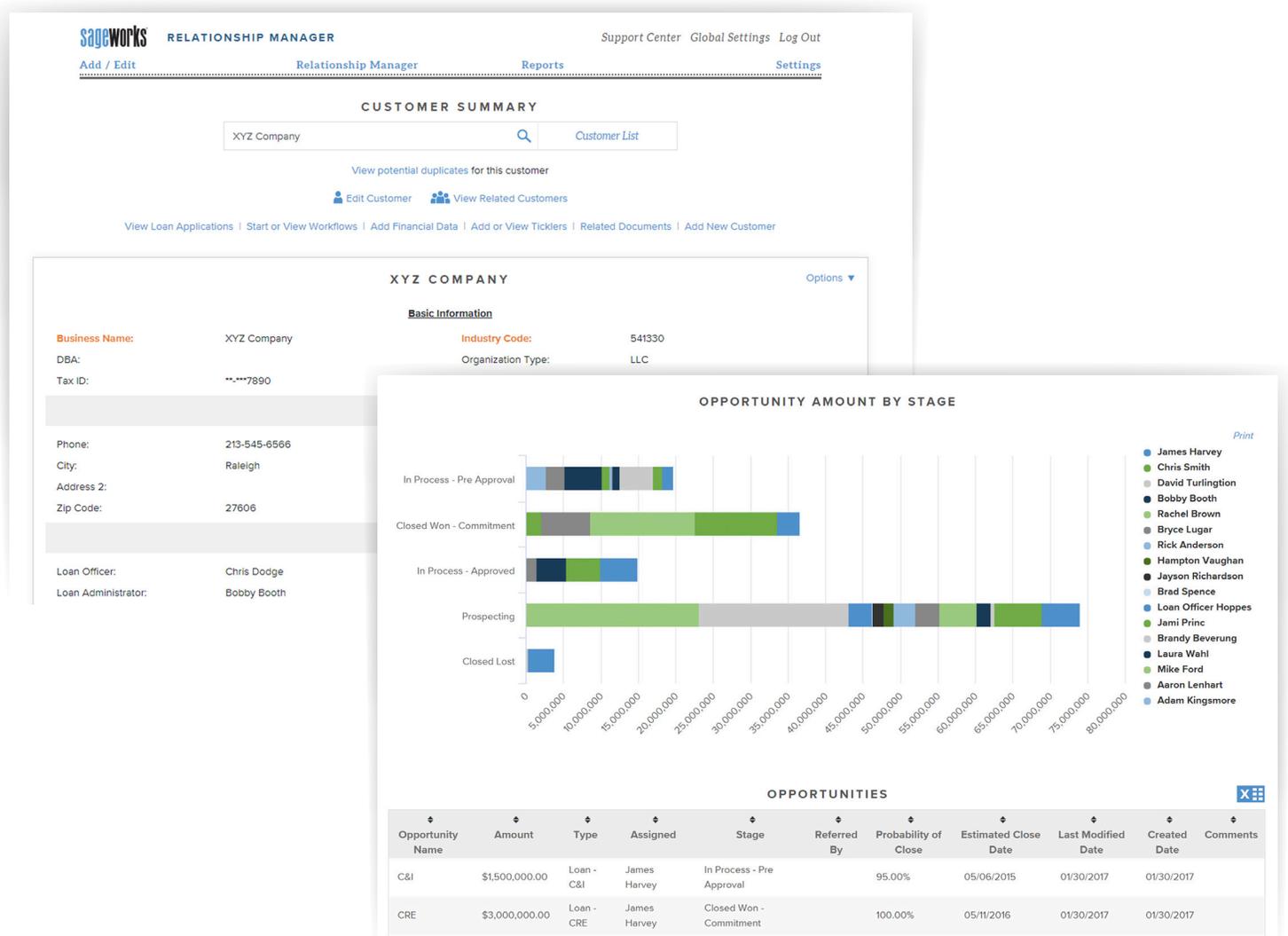
Switching to a CRM

Change can be hard but managing a sales pipeline out of an email inbox, spreadsheets or stacks of business cards is harder. If customer information is stored disparately, it is impossible for different departments at the institution to report on up-to-date customer activity. For a management team trying to hold lenders accountable for sales activities, develop a reliable business forecast and grow the portfolio, it's time for a strong CRM.

Banks and credit unions use Sageworks Relationship Manager to optimize customer relationships, boost loan growth and increase efficiency at their institution. They are equipped to provide high quality service, manage risky customers and forecast sales and earnings accurately. Importantly, it enables collaboration among departments for overall results.

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

Why Sageworks Relationship Manager?

Better information, better relationships.

Applies new layout template → Change Page Layout

CUSTOMER SUMMARY

Customer List

View potential duplicates for this customer

Edit Customer | View Related Customers

rkflows | Add Financial Data | Add or View Ticklers | Related Documents | Add New Customer

Options to edit and export

XYZ COMPANY Options ▼

Basic Information

Industry Code: 541330

Organization Type: LLC
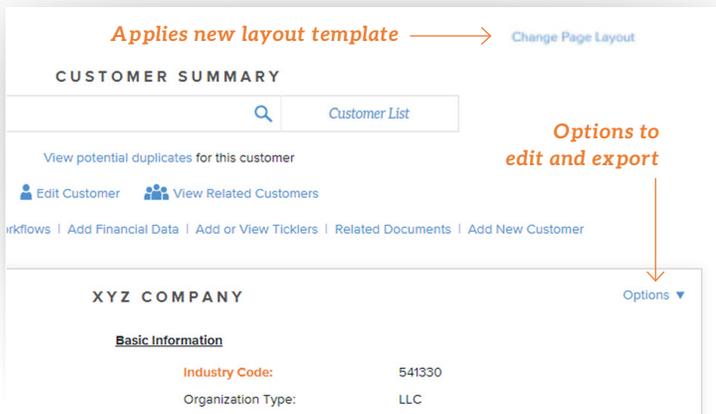
360° Customer Profile

✓ 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

OPPORTUNITY AMOUNT BY STAGE
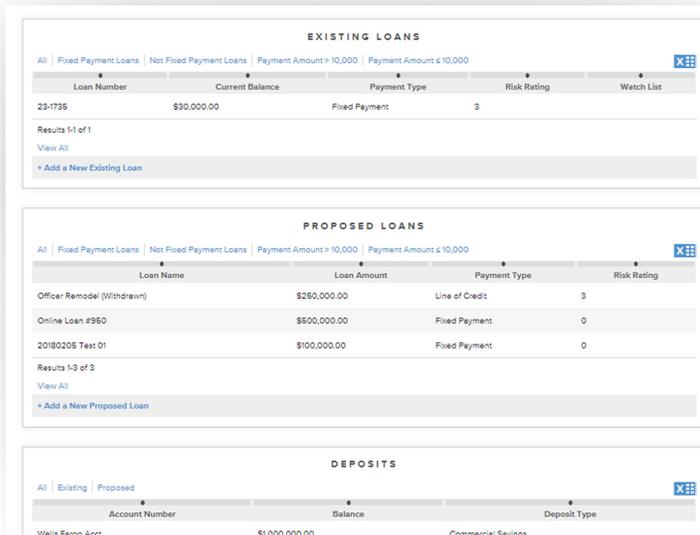
Efficiency, Consistency & Customization

✓ 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 institution's unique needs

EXISTING LOANS

All | Fixed Payment Loans | Not Fixed Payment Loans | Payment Amount > 10,000 | Payment Amount ≤ 10,000

Loan Number	Current Balance	Payment Type	Risk Rating	Watch List
23-1735	$30,000.00	Fixed Payment	3	

Results 1-1 of 1
View All
+ Add a New Existing Loan

PROPOSED LOANS

All | Fixed Payment Loans | Not Fixed Payment Loans | Payment Amount > 10,000 | Payment Amount ≤ 10,000

Loan Name	Loan Amount	Payment Type	Risk Rating
Officer Remodel (Withdrawn)	$250,000.00	Line of Credit	3
Online Loan #950	$500,000.00	Fixed Payment	0
20180205 Test 01	$100,000.00	Fixed Payment	0

Results 1-3 of 3
View All
+ Add a New Proposed Loan

DEPOSITS

All | Existing | Proposed

Account Number	Balance	Deposit Type
Wells Fargo Acct	$1,000,000.00	Commercial Savings