Oracle CRM On Demand Financial Services Edition - Wealth Management Solution and Oracle FLEXCUBE Private Banking

Oracle's Wealth Management solution empowers financial advisors with the tools, information and insight to maximize their productivity and help clients achieve their personal financial goals. The solution enables financial advisors to better leverage their clients' portfolio information together with embedded analytics to identify cross-sell and up-sell opportunities, improve customer retention and maximize the value of assets under management.

Oracle CRM On Demand Finanical Services Edition - Wealth Management Solution Hightlights :

- Complete CRM Functionality
- World-Class Business Analytics
- Referral Management
- Lead and Opportunity Management
- Household Management
- Financial Account & Portfolio Tracking
- Financial Account Holders & Relationships
- Holdings & Summary Transactions
- Financial Plan Summary and Lifecycle Management

CRM On Demand Highlights

CRM On Demand's enhanced Banking and Wealth Management functionality extends the current Oracle CRM On Demand Financial Services Edition to deliver the complete financial desktop experience for bankers and financial advisors. These industry capabilities empower banking professionals and financial advisors to better attract, plan, manage and retain customers, increase revenues, and maximize return on investment all from within their Oracle CRM On Demand solution. With less customization and accelerated deployments, Banking and Wealth Management companies have a complete, open and integrated desktop experience. Through the modeling of complex account, client and household relationships, CRM On Demand delivers the deep industry specific features and the integration readiness to leverage existing corporate systems & Oracle's Financial Services Footprint including Oracle FLEXCUBE Private Banking Suite and Oracle FLEXCUBE Core / Universal Banking.

Improve Investment Advisor Productivity

Oracle provides banks, financial institutions and other wealth management service providers with a wealth management solution to help manage their book of business, manage relationships, track and convert opportunities. The solution provides a powerful contact management, task management, and solution with embedded analytics by advisors, sales managers and sales executives accessible from anywhere. Out of the box verticalized objects enable integration of external data for more in-depth analysis. Advisors can also count on a complete 360-degree view of a client's household with full understanding of each household's financial and investment risk profile, including consolidated portfolios, leads, opportunities, notes, and tasks for all contacts in a household. This provides advisors with instant access to important client information needed to effectively cross-sell and up-sell additional financial services products or to serve clients. Overall, the solution enables the ability to:

- Leverage portfolio and embedded customer analytics
- Make the right recommendation at the right time
- Manage complex client relationships at every level

As a result, financial institutions can improve advisor productivity and strengthen client relationships.

Deliver Consistent Quality of Service Across Channels

The Oracle solution consolidates information on clients on investment assets including key performance measures. The solution incorporates business processes that make it easy for advisors to access important contact, household, and portfolio information to provide personalized service to their clients. This includes get convenient access to a client's comprehensive portfolio, including brokerage accounts and life insurance policies with multiple levels of detail. Advisors can also manage opportunities and service requests from a single integrated view while intelligent routing sends leads and service requests to the appropriate user. This includes a seamless process for financial advisors to actively track referrals and leads. Financial advisors are enabled to:

- Manage customer information, assets and performance from one place
- Execute seamlessly with the customer to improve overall financial performance
- Ensure customer referrals and service requests are seamlessly routed

With these capabilities, financial institutions can ensure a consistent superior quality service across channels.

Oracle FLEXCUBE Private Banking Solution Highlights:

- Financial Planning & Portfolio Construction
- Order Origination & Transaction Capture
- Portfolio Aggregation & Administration
- Portfolio Analysis & Monitoring
- Portfolio Simulation & Rebalancing
- Wealth Reporting

Provide Advisor-Driven and Self-Directed Service

Oracle FLEXCUBE Private Banking helps banks, capital markets and investment management firms to deliver both self-directed and advisor-driven wealth management solutions. This customer-centric solution includes a wealth management portal, customer interaction tool, and portfolio management capabilities—all which can be integrated with core banking solutions and other appropriate surround systems for end to end wealth management delivery. By creating a platform that unites all customer assets, the customer is transformed from simply a source of input into an active member of the portfolio management team. Major aspects of the offering include the ability to:

- Engage the customer to plan, execute & monitor their wealth building strategies
- Assess portfolio performance and respond rapidly to market changes
- Create a consolidated, unified portfolio and deliver differentiated service

With Oracle FLEXCUBE Private Banking, your wealth managers can understand what customers want, increase the reach and distribution of the services offered, and deliver superior customer service.

Summary

Oracle's CRM On Demand Financial Services Edition - Wealth Management Solution enables financial advisors to provide better customer service and improve lead and referral management effectiveness. The solution enables firms to manage all customer and portfolio and information from a single source, easily leverage embedded analytics and expand service across channels. Financial service providers can also easily utilize Oracle's complete set of CRM capabilities. Oracle FLEXCUBE Private Banking is tailor-made to address wealth manager's needs. This enables advisors to draw up multiple investment strategies, measure portfolio performance, filter information, and create customized reports through a single interface. Join the many financial service organizations that rely on Oracle for better business insight, adaptive business processes and a superior ownership experience.

CONTACT US

To learn more, please visit our website at www.crmondemand.com, www.oracle.com/industries/financial_services and our CRM Blog at: http://blogs.oracle.com/crm or call +1.866.906.7878 to speak to an Oracle representative.

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