ORACLE CRM ON DEMAND FINANCIAL SERVICES EDITION – WEALTH MANAGEMENT SOLUTION

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CRM ON DEMAND

With Oracle CRM On Demand Financial Services Edition – Wealth Management Solution you can grow production and assets under management. Oracle CRM On Demand Financial Services Edition –Wealth Management Solution is the first hosted CRM solution designed specifically for financial advisors. It enables financial advisors, such as insurance agents, financial planners, and wealth advisors to better leverage their clients' profile and portfolio information to identify cross-sell and up-sell opportunities, improve customer retention and increase wallet share with their customers. Incorporating best practices in the financial services industry, Oracle CRM On Demand Financial Services Edition – Wealth Management Solution empowers advisors with the tools and insight to ultimately maximize their production and assets under management.

THE WORLD'S MOST COMPREHENSIVE CRM ON DEMAND SOLUTION

- Easy to use
- Fast to deploy
- Powerful analytics
- Built-in contact center
- Prebuilt industry solutions
- Embedded marketing, sales and service best practices

KEY FEATURES

REFERRAL MANAGEMENT

- Automatic lead creation
- Ability to view all referrals made by a particular client

HOUSEHOLD MANAGEMENT

- Single household view
- Household, financial, and investment risk profile tracking
- Consolidated portfolio, leads, opportunities, notes and tasks for a household
- Selective rollup of household members

Improve Referral Management Effectiveness

Oracle CRM On Demand Financial Services Edition – Wealth Management Solution enables a seamless process for financial advisors to actively track referrals and leads. Starting with the contact profile, advisors can view all referrals made by a particular client. As advisors log each referral, new leads are immediately created, which ensures that referrals do not get lost in the system, thus improving follow-up rates and referral effectiveness.

Build Stronger Client Relationships

Advisors build trust by demonstrating a solid understanding of a client's financial and personal needs and interests. Oracle CRM On Demand Financial Services Edition – Wealth Management Solution enables advisors to track a client's interests, such as investment types, industries or markets, individual stocks, sports or hobbies. Whether to build personal rapport with a client, or to generate new sales opportunities, tracking client interests is a key component of establishing client relationships that generate future business.

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KEY FEATURES

PORTFOLIO TRACKING

- Consolidated book of business tracking
- Portfolio hierarchy
- Household-level portfolios
- Contact-level portfolios

LEAD AND OPPORTUNITY MANAGEMENT

- Easy lead creation, assignment and qualification
- Lead and opportunity revenue tracking

CONTACT MANAGEMENT

- Single view of client book of business
- Financial and investment risk profiles
- Consolidated portfolio, leads, opportunities, notes and tasks

EMAIL INTEGRATION

- Integration with Microsoft Outlook and Lotus Notes
- Automatically link incoming and outgoing emails with associated contacts, accounts, leads and opportunities

Obtain Consolidated Profile Of Households

Oracle CRM On Demand Financial Services Edition – Wealth Management Solution provides advisors with 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. Advisors are able to easily control their view of a household's financial profile by selecting which household members will be included in the consolidated household view. 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.

Access Comprehensive Up-To-Date Client Portfolios

Oracle CRM On Demand Financial Services Edition – Wealth Management Solution provides advisors convenient access to a client's comprehensive portfolio, including brokerage accounts and life insurance policies. A portfolio hierarchy lets advisors track multiple levels of detail within a customer's portfolio. For example, a client may have an investment account containing mutual funds, and within each mutual fund are specific holdings. Tracking this level of detail of the customer's investments increases the knowledge and understanding of the customer's financial picture, and allows an advisor to service the customer more effectively.

Improve Advisor Loyalty

Oracle CRM On Demand Financial Services Edition – Wealth Management 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. Industry-specific enhancements tailored to financial advisors, combined with market-leading core CRM capabilities, equip advisors with the sales productivity and effectiveness tools to maximize business performance. Since ease of doing business is a key factor in cultivating and maintaining advisor loyalty, providing an intuitive and easy-to-use CRM solution will result in improved advisor loyalty.

Bottom Line

By offering compelling industry-specific enhancement and embedded business processes to improve sales effectiveness, Oracle CRM On Demand Financial Services Edition – Wealth Management Solution enables advisors to better attract and retain customers and increase revenues, while maximizing your return on investment.