



CRM

Baker Hill NextGen® CRM combines all business processes and client information, integrating data into one tool to enhance client experience. Data can be imported daily from your core systems or external systems, the centralized database becomes a resource for satisfying reporting needs.

Baker Hill NextGen® CRM transforms the way you bring people and processes together.

Relationship Management Processes

Baker Hill NextGen® CRM can help you transform your client and prospect data into actionable information, integrate with Baker Hill NextGen® portfolio risk management and loan origination systems, and reinforce cultural and behavioral changes throughout your sales organization.

Baker Hill NextGen® CRM supports the relationship management process, delivering a strong return on investment.

▶ Active Relationship Management

Our CRM solution encourages strategic sales planning and service integration across lines of business, allowing you to nurture relationships with top clients.

▶ Client Treatment Strategies

Our streamlined quick view interface offers a snapshot of client value and risk so you can focus your relationship management on key clientele. At the same time, we'll help you manage a watch list of high-risk credit clients.

▶ Call Activity Management

Consolidated views of client activity ensure that a client can speak to any relationship manager and receive a consistently exceptional level of service. Simple correspondence tools allow you to generate individual on-demand letters as well as mass-merge letters.

▶ Opportunity Management

Keep track of your most promising prospects. Baker Hill NextGen® CRM will prioritize opportunities by probability of close, stage, and anticipated close date while also tracking sales opportunities types, amounts, and fees.

▶ Referral Management

Team members can access point-in-time status—by quantity and quality across the organization—for all active referrals. Our CRM module creates unique strategies to manage external referral sources actively and improve the number and quality of referrals.

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Explore how your institution can manage relationships more effectively with Baker Hill NextGen® CRM. To learn more, visit

www.bakerhill.com/CRM

Gain and Retain Business

Baker Hill NextGen® CRM focuses on the sales management stage of the relational cycle, addressing the need to attract and retain valuable clientele. The solution is configured so each line of business, calling officer, and service team member can achieve individual performance targets while communicating client activity, goals, and opportunities across the institution.

Maximize Client Relationships

Capture and manage pertinent client and prospect information, including:

- ▶ Contacts
- ▶ Call activity and touch history
- ▶ Products and collateral
- ▶ Sales opportunities
- ▶ Client classification and segmentation
- ▶ Relationship groups
- ▶ Client-specific relationship plans
- ▶ Referrals
- ▶ Correspondence groups



Baker Hill is in the business of evolving loan origination by combining expertise in technology with expertise in banking. Built on decades of walking alongside banks and credit unions as they provide vital resources to their communities, Baker Hill NextGen® is a configurable, single platform SaaS solution for commercial, small business, consumer loan origination, and risk management that grows along with you as your business needs change. Baker Hill is lending evolved. For more information, visit www.bakerhill.com.