CRM

TRANSFORM THE WAY YOU BRING PEOPLE AND PROCESSES TOGETHER

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

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

WHY CRM?

Gain actionable insights that empower your staff to manage new opportunities and current relationships most effectively.

800.821.8664
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CONNECT

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

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.

MODULES

CRM Address key processes centered on sales relationship management

EXCEPTION TRACKING Automate document, policy, compliance, and exception management

STATEMENT SPREADING Improve the quality and consistency of financial analysis to support sound credit decisions

PORTFOLIO RISK MANAGEMENT Continually monitor the overall health of the entire client portfolio

1. **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.
2. **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.
3. **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.
4. **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.
5. **Referral management—**Team members can access point-in-time status for all active referrals, which are assessed by quantity and quality across the organization. Our CRM module creates unique strategies to manage external referral sources actively and improve the number and quality of referrals.

Baker Hill empowers financial institutions to work smarter, reduce risk and drive more profitable relationships. The company delivers a single unified platform with modern solutions to streamline loan origination and portfolio risk management for commercial, small business and consumer lending. The Baker Hill NextGen® platform also delivers sophisticated analytics and marketing solutions that support sound business decisions to mitigate risk, generate growth and maximize profitability. Baker Hill is the expert solution for loan origination, portfolio risk and relationship management, CECL, and analytics for financial institutions in the United States. For more information, visit **www.bakerhill.com.**

bakerhill NextGen®