

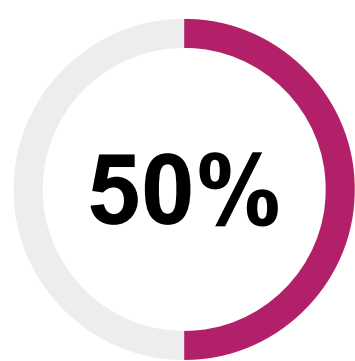


Personalize Banking Experiences with Korcomptenz and Dynamics 365

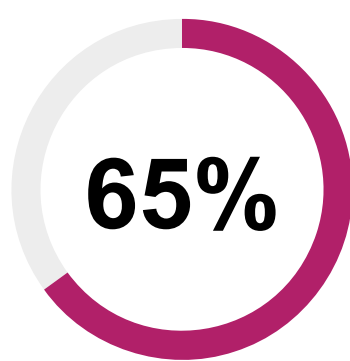
The next generation of banking and financial clientele is here. Build strong customer experiences and accelerate business growth using intelligent customer insights and process automation.

Propel your financial services business forward

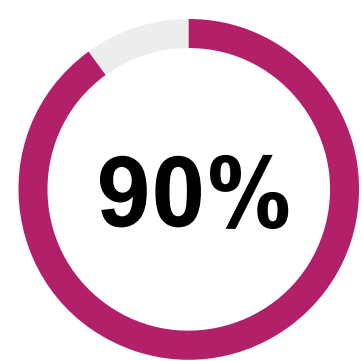
In a rapidly evolving market, staying ahead requires leveraging technology to overcome challenges. Microsoft CRM offers a comprehensive solution to streamline your operations, enhance customer engagement, and ensure data security.



50% of customers think their banking relationships are **neither emotionally connected nor well-integrated** into their lifestyles.



65% cited **improved self service as a key driver** of decreased call volumes.



90% of customers rate an **"immediate" response as important** or very important when they have a customer service question.



Empower agents

- Resolve customer issues faster with Copilot, an AI-powered assistant that helps search for relevant information across trusted websites and internal documents.
- Provide employees with the support needed to deliver a consistent experience with guided workflows and a unified view of the customer.
- Increase employee effectiveness and cross-team collaboration by connecting relationship managers, private bankers, loan officers, agents, and advisors with customers in a low friction compliant way.

Deliver differentiated experiences

- Offer seamless, personalized interactions to prospective customers on the channel of their choice.
- Build understanding at every interaction and act where it matters most.
- Rich self-service capabilities via digital channels with secure, low friction authentication.

Optimize operations

- Improve customer retention and enhance upsell rates with real-time personalized interactions and supporting offers.
- Improve fraud detection with adaptive AI that continuously monitors fraud patterns.
- Develop agility to evolving global conditions and ensure business continuity with seamless remote collaboration.
- Unify data and apply advanced analytics to predict risks, stay on top of regulatory requirements, and increase operational efficiency.

Key Challenges

- ◆ **Fragmented Customer Data:** Disparate systems leading to incomplete customer views.
- ◆ **Inefficient Sales Processes:** Manual and disjointed sales activities affecting performance.
- ◆ **Limited Marketing Impact:** Ineffective targeting and engagement due to inadequate tools.
- ◆ **Compliance and Security Risks:** Increasing regulatory requirements and data security concerns.

Our Offerings

Consulting & Advisory

- Strategic planning for CRM adoption
- CRM roadmap development

Implementation

- Sales and Marketing Automation
- Data Inventory and Migration from legacy to CE
- Azure/Power Automate Integration to Core Banking/3rd Party Application

Support services

- Integration (Data + CRM + ERP)
- Customization
- Customer Analytics
- Adding new modules

Testing

- Functional Testing
- Automation Testing
- Performance Testing
- Security Testing



Technologies

◆ Dynamics 365 Sales

Streamline sales processes and improve customer engagement. Using Dynamics 365 Sales, you can efficiently oversee sales pipeline, monitor leads, and automate sales workflows. Get insights to prioritize tasks and close deals faster.

◆ Dynamics 365 Customer Service

Deliver unique customer service experiences by providing a unified platform to handle your customer inquiries, cases, and support requests.

◆ Dynamics 365 Marketing

Create personalized campaigns, nurture leads, and track campaign performance to drive customer engagement and loyalty.

◆ Dynamics 365 Field Service

Optimize your field service operations to schedule resources, dispatch technicians, and manage service contracts efficiently.

◆ Dynamics 365 Customer Insights

Unify your customer data from various sources to provide a 360-degree view of customers, enabling you to personalize interactions and anticipate customer needs.

◆ Dynamics 365 Commerce

Support omnichannel commerce experiences and manage e-commerce operations, including merchandising, inventory management, order fulfilment, and personalized marketing.

Why KOR

◆ Early Involvement

- Requirement clarity
- Early issue identification
- Risk mitigation
- Better collaboration

◆ Dedicated Resources

- Consistency
- Expert knowledge
- Efficiency
- Team cohesion

◆ Tools & Technologies

- Reusability & scalability
- Efficiency & time-saving
- Faster defect identification
- Multiple tools identification
- Cost-saving
- Enhanced risk mitigation

◆ Model-based Test

- Comprehensive coverage
- High-level of optimization
- Domain specific
- Single set of test design
- Automation compatible

◆ Full-stack Test

- Deployment of tools, processes & skilled test personnel

◆ Partnerships

- CRM partnership with Salesforce & Microsoft Dynamics Cloud partners with AWS, Azure, OCP



Korcomptenz

Korcomptenz is a total technology transformation provider that partners with clients to improve their digital experience and insight. We unlock the power of technology in the areas of ERP, CRM, infrastructure management, cloud, data and AI to empower our clients with intelligent and experiential solutions. We **#FocusOnYou**

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Get in touch with us:

+1 (973) 601 8770 | sales@korcomptenz.com

