CRM for Banking

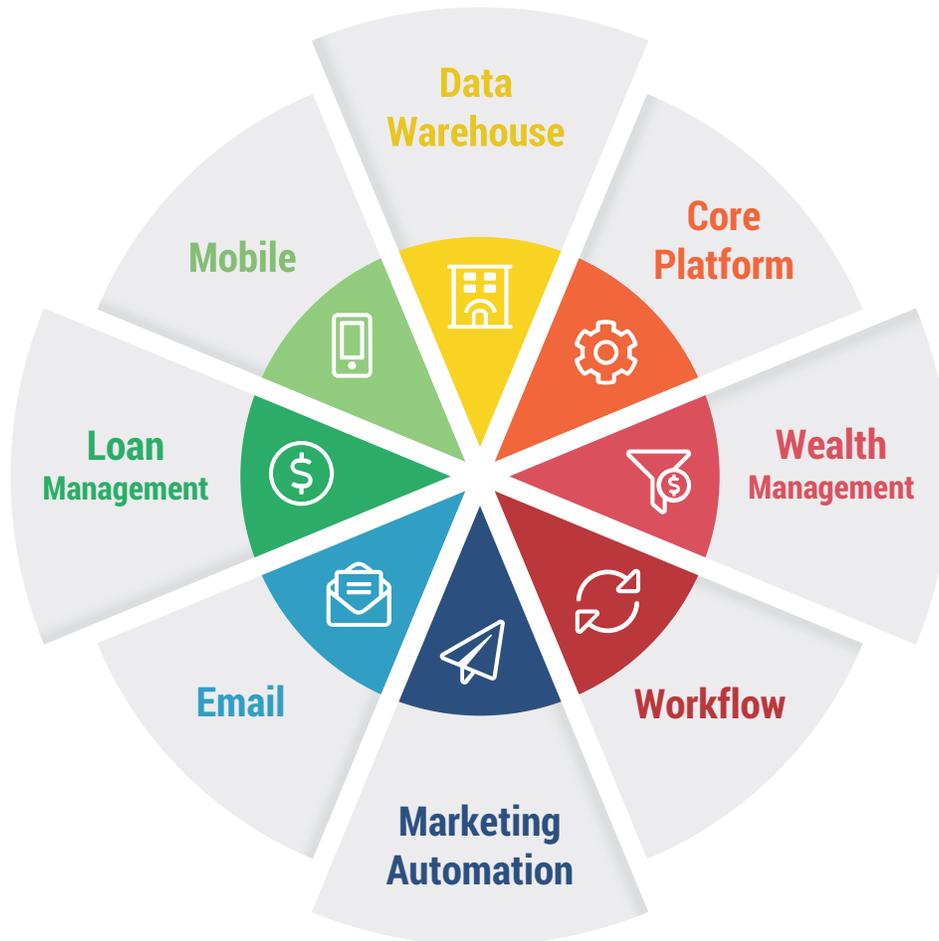## Top 5 Ways Sugar Integrates with Banks

sugarcrm

SugarCRM enables businesses to create customers for life with the world's first intelligent, no touch customer experience (CX) platform.

- Data Warehouse
- Core Platform
- Wealth Management
- Workflow
- Marketing Automation
- Email
- Loan Management
- Mobile

Features

1. ## Householding

   Household relationships among customers allow you to understand and explore relationships that exist between your customers. This results in a significant opportunity for up-sell, cross-sell and improving customer relationships. The householding process in Sugar will show relevant relationships between customer records; such as the same home telephone number or the same home address, a workflow or business rule will then link the records for future reference.

2. ## 360-Degree View of Your Customers

   Sell proactively and avoid surprises by knowing what matters to your customers, when it matters. Know your customers inside and out with 360-degree activity history across the extended customer community. Quickly understand what matters to your key contacts and when to engage with smarter account intelligence based on cross-channel and social media activity.

3. ## Product Cross-Selling

   Your banking customers may have the same or a similar product, but it might be very different in profitability:

   Some of your customers have more in their checking accounts than others. Some pay more fees for overdrafts or late charges on loan payments. Some use the credit cards you offer while others do not.

   With Product Cross-Selling in Sugar, you can present new products that are available based on the product profile of a customer in real time.

4. ## Referrals

   Allow users within the bank to issue and track referrals between business units. A branch operator may identify that a customer is looking for a specific loan product, and with one click the operator can route the customer to the appropriate team. Distinct Dashboards and Alerts will notify the assigned business unit of the referral. All referrals are tracked to ensure sure that the assigned Business Unit has received the referral. We have found that this will increase communication between departments by over 20%. More Referrals = More Money.

5. ## Core Banking Platform

   Integrate Sugar at the core of all your banking applications including:
   - Deposit and transaction information
   - Loan Approval and Application Status
   - Marketing Automation
   - Data Warehouse
   - Business Analytics

   By having Sugar as your central hub, transform your bank into a customer-focused, profitable sales machine.