Creatio Academy

Finance and banking

Financial Services Creatio Overview

Version 8.0

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Financial Services Creatio Overview

PRODUCTS: BANK CUSTOMER JOURNEY LENDING BANK SALES

Financial Services Creatio is a platform for professional management of banking processes on all stages of interaction with your customers.

Automate business processes of your bank using a smart no-code platform and BPM technology. You can also synergize Financial Services Creatio with other Creatio products and ready-made Creatio Marketplace solutions.

Get the optimal Financial Services Creatio configuration depending on the specifics of your bank:

- **Lending**. A solution for credit conveyor automation. Includes a set of tools for managing loan applications and contact profiles to find and offer products that best match customer needs.
- **Bank Sales**. An automation system for corporate sales of financial services.Includes a set of tools for working with leads, tracking lead sources, handing leads off to sales, and monitoring the financial indicators of your customers.
- **Bank Customer Journey**. A set of ready-made processes for front office automation as well as bank products customozation and support.Includes a set of tools for banks that mostly work with individuals. Lets you manage the service catalog and handle customer cases via multiple channels, including self-service portal.

Financial Services Creatio tools are also available as part of the banking bundle, a platform that combines financial service and marketing tools.

Financial Services features

Sections	Bank Sales	Bank Customer Journey	Lending
Contacts	+	+	+
Legal entities	+	+	+
Activities	+	+	+
Knowledge base	+	+	+
Feed	+	+	+
Documents	+	+	+ (hidden)
Employees	+	+	+
Calls	+	+	+
Leads	+	+	—

Sections	Bank Sales	Bank Customer Journey	Lending
Opportunities	+	—	—
Products	+	+	+
Contracts	+	+	+
Forecasts	+	—	—
Landing pages and Web-forms	+	+ (hidden)	+ (hidden)
Cases	—	+	—
Services	—	+	—
Queues	—	+	+
Home page	+	+	+
Cards	+	+	+
Financial accounts	+	+	+
Financial indicators	+	—	—
Applications	—	+	+
Application forms	—	—	+
Consultation panel	—	+	—

Financial Services tools

360° customer view. Use [*Legal entities*] and [*Contacts*] sections to maintain a common database of the bank customers, employees, and branches. Integrate the application with social networks to enrich the contact database with imported data. Search for and merge duplicates, segment customers, and analyze data using sophisticated tools. Read more >>>

Communication management. Use the corporate social network to post company news and facilitate internal discussions. Employees can also use the [*Activities*] and [*Feed*] sections to record their schedule as well as plan future tasks and appointments. Read more >>>

Document flow management. Use the [*Contracts*] and [*Documents*] sections to manage documentation, e. g., contracts, additional agreements, specifications, regulations, meeting minutes, and correspondence. Attach a soft document copy for quick access to document content. Use the automated approval process to enhance commercial document approval procedures. Read more >>>

Bank catalog and product selection management. Use the [*Products*] section to store information about bank products in a customizable product catalog. Information about bank products is available in the user-customizable product catalog. Read more >>>

Set up bank product categories, types, and sale conditions. Read more >>>

Automate product selection using product recommendations (Next Best Offers) based on predictive data analysis. Use Next Best Offers to nurture a personalized approach, improve communication with existing customers, and attract new customers. Read more >>>

Loan applications and profile management. Use the [*Applications*] section to create and process loan applications. Quickly find and offer products that best match customer needs.

Add deal participant profiles based on data from applications in a single click to begin processing the borrower documents. Use the [*Application forms*] section to track information on the deal participants and use the information to make informed decisions on whether to grant or deny loans. Read more >>>

Financial account and card management. Use [*Financial Accounts*] and [*Cards*] sections to accumulate information about bank cards as well as current, deposit, and other financial accounts. View relevant information about the existing bank products, products in stock, status, and other account or card parameters. Read more >>>

Opportunity management. Use the [*Opportunities*] section to take advantage of the corporate sale workflow that follows the world’s best practices in bank sales management. The process lets you handle a large number of deals simultaneously as Creatio recommends the needed steps for each opportunity phase, from prospecting to signing a contract.

You can use the bank sales pipeline and other analytical tools to estimate the efficiency on each opportunity phase and find bottlenecks. Read more >>>

Sales forecasting. Use forecasting tools in Financial Services Creatio, Sales edition to plan out your business strategy intelligently. Forecast bank sale volumes by sales associates, accounts, or industries easily. Compare indicators across periods and apply smart filtering tools to get the information you need in seconds.

Evaluate the probability of meeting bank sale quotas using the plan vs. actual analysis tools in Creatio. When calculating results, Creatio takes into account both the number of closed deals and the number of opportunities in the pipeline with their closure probabilities. Using Financial Services Creatio, Sales edition, managers can analyze the efficiency of bank sales associates easily and make the road to reaching the sales goals clear. Read more >>>

Financial indicators. Use the [*Financial indicators*] section to analyze how many active bank accounts the customer has, their balance, total revenue, number of accounts receivable and accounts payable, and other aggregates. You can browse data as a record list or as a dashboard of charts and metrics. To have a full understanding of customer revenue, compare target and actual values, analyze changes over a period, view data by accounts, customers and segments.

Bank service level management. Streamline the workflow of your contact center using the consultation panel. The panel lets your agents find the needed information quickly and provide high-quality consultations on products and services. Use the [*Cases*] section is designed to process and manage customer requests for bank products. Read more >>>

Knowledge base management. Use the [*Knowledge base*] section to store answers to frequently asked questions, document excerpts, bank procedures, and other useful information. You can supplement the articles with files or links to web sources, consolidate articles in groups, and enable the employees to comment articles. Read more >>>

Creatio Marketplace plugins, add-ons, and templates. Accelerate time-to-strategy execution with ready-made processes, templates and apps you can easily download and install from the Creatio Marketplace. The apps range from extensions to full-fledged products. You can also order services from certified Creatio partners.