TechRules
CRM & Task Planner

TechRules CRM

A 360º view of each customer to allow financial advisors to be more efficient
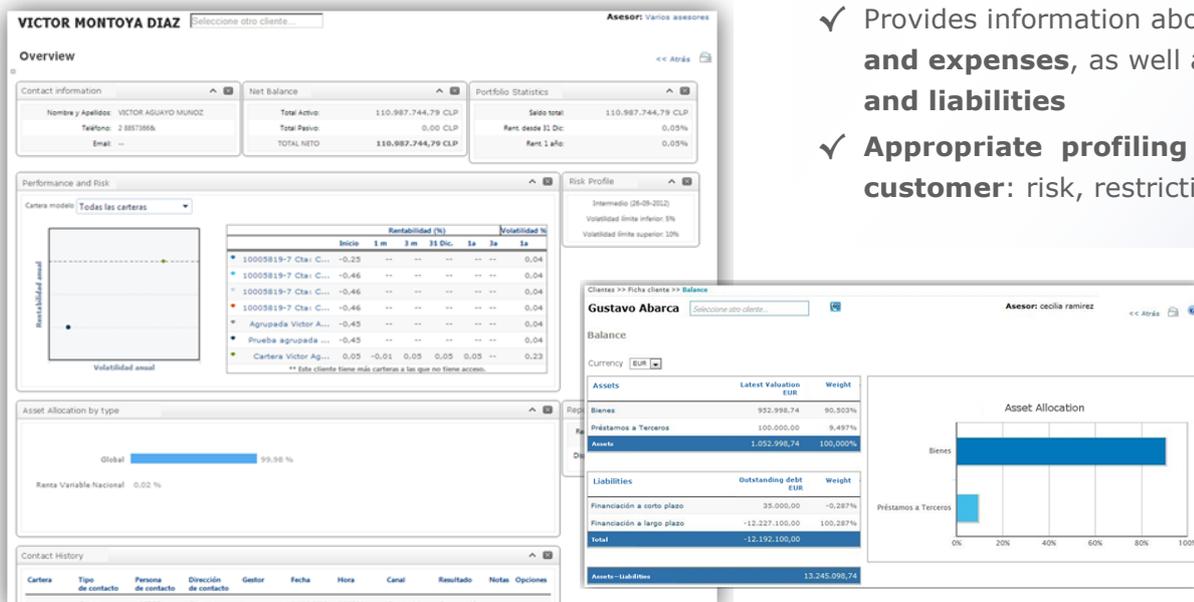
As the financial industry continues to consolidate in a changing environment, entities require **new and innovative strategies** to remain competitive, creating growth opportunities to contribute to the bottom line. That is why in order to provide value, **TechRules** enables wealth management firms to focus on their **core business: the clients.**

We help you to increase **efficiency, effectiveness and profitability** by streamlining and automating your processes.

TechRules Financial CRM helps businesses to provide better customer service, simplifying sales processes and increasing customer revenues.

Main Functionalities

✓ Operates integrating **existing Model Portfolios**

✓ Integrates **Rebalancing Module**

✓ **Performance and risk matrix** of all portfolios

✓ **Integrates data** in **only one application; SOA service**

✓ **Customizable advisory dashboard**

✓ Client net wealth in **different currencies**

✓ Provides information about **incomes and expenses**, as well as **assets and liabilities**

✓ **Appropriate profiling of the customer**: risk, restrictions, etc.

BENEFITS

- Identifying in just one click **where to take decisions** about customer portfolios

- Offers advisors a **graphical snapshot** of what's happening and what needs to be done prioritizing by advisor in their own personal or team calendar

- Be able to always **take risk under control** rebalancing customer portfolios

- Identify **more up-sell and cross-sell opportunities**

- Be more efficient by **prioritizing your tasks and alerts**

- Combines **operational** and **analytical customer relationship** management processes

- Focus on creating **customer's loyalty**

PLATFORM FEATURES

- Get **all relevant information** with just two clicks!

- Keep a **comprehensive record of customer contacts** as well as proposals, pending tasks, etc.

- Personalized and **easy to use interface**

- Single repository, all the information **integrated with core systems**

- **Broad overview** of the daily most important information

- Customize and **prioritize** what's more important

- Open solution, built as a **cloud based** platform

- Minimize administrative demands and **maximize client interaction**

> **With TechRules CRM and Task Planner solution, advisors will have all customer information (contacts, proposals, task and alerts, etc.) integrated in just one platform to take more efficient decisions and maximize customer interactions.**

TechRules with more than 20 years of **proven expertise** and understanding of financial industry exceeds all expectations **providing 360º view of your customers**.

We manage and organize your client's data and provide easy to use reports that help advisors manage their client's portfolios, **being easy to integrate into existing banking applications at the same time.**

Tower CRM has been designed to **provide a high degree of flexibility** accessing to customer information either through the "Tower CRM platform" or through the existing systems of the bank.

360 º Portfolio View

Client Risk Profile

Investment Proposals

Alerts & Tasks

Investment and grouped portfolios

Financial Planning Proposals

Rebalancing Process

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