- **A customer centric view**

Quipu CRM enables financial institutions to tailor their offer of products and services to their clients' individual demand. Clients can be aggregated by different rules to form group of related parties managed to ensure proper business support and risk management. All the business of the client and the products used with the financial institution are pooled in the CRM for easy monitoring and follow up.

- **Customisation capabilities**

Financial institutions can easily adapt Quipu CRM to their own work flows and business logic.

- **User friendly**

Quipu CRM is intuitive and easy to use. Based on Microsoft technology, the user's experience is consistent with the familiar standard applications found in Office, such as Outlook.

- **Real time, real world**

Quipu CRM gives users an updated overview of the clients in their portfolio: their current activities, requests, proposals, statuses. Key performance indicators can be tracked in real time.

CRM's Dynamic Dashboard provides an easy-to-read, accurate view of ongoing developments. Users can define the default dashboard to display every time they log in, immediately providing a clear visualisation of the data they need in order to do their job well.

- **Access client-related data anytime, anywhere**

Because it is a web-based application, authorised users can retrieve, edit, or add information to Quipu CRM 24 hours a day, 7 days a week, from any location, using nothing more than a standard web browser.

- **Consistent monitoring**

Quipu CRM offers dynamic reporting facilities, enabling financial institutions to design specific reports for each user, client, business unit, etc. All reports can be made available as preformatted print-outs.

- **Integration with other systems and applications**

Quipu CRM is fully integrated with Quipu Core Banking System, but can also be integrated with other applications. Information from external sources, such as lists of companies registered with the tax office, is also accessible from CRM thanks to connections to external databases. Quipu CRM integrates natively with other Microsoft products such as Word, Excel, Skype for Business, Outlook and SharePoint Server.

- **Role-based security**

Quipu CRM's access privileges are based on the user's role and function. The integrity and security of confidential client information is ensured at all times by preventing unauthorised access to the data.

- **Support for Decision Making**

Business Committee Preparation is a new feature of Quipu CRM 3.0, designed to support and document the decision-making process with respect to future co-operation with an existing or potential client.

- **Implementation support**

Once the decision to deploy CRM is taken, Quipu and the financial institution jointly prepare a detailed implementation project plan. Quipu CRM is configured to meet specific requirements of the institution's business and its country of operation.

- User training

Quipu offers user training on-site, at the financial institution's location or at Quipu's Regional or Head Office. Training is provided in different phases reflecting the project implementation status, and the specific job requirements of different users. In addition, Quipu provides a full set of documentation in electronic or printed format.

- Marketing Campaigns Management

- Risk management tools, including supporting the financial analysis of clients

- Support for in depth environmental assessment of a client's business

- Call Center integration