

## Customer Relationship Management (CRM)

Quipu CRM (Customer Relationship Management) is one of Quipu's newest developments. It is based on Microsoft Dynamics CRM 2016, a CRM software package provided by Microsoft.

Quipu Core Banking already comes with some CRM capabilities, but in order to meet the needs of financial institutions for more sophisticated tools to aid in acquiring and retaining clients we decided to develop Quipu CRM.

Quipu CRM helps financial institutions to maintain high-quality relationships with their customers and expand their client portfolios efficiently. The focus of Quipu CRM enables financial institutions to offer a differentiated and highly personalised service, by not just focusing on the products that a client uses, but providing a broader view of the relationship as a whole, and its potential for development.

Quipu CRM is a highly secure web-based application with a range of user-friendly features:

- Intuitive graphic interface
- Real time synchronisation to the Core Banking System
- Customer centric view
- Supports acquisition of new customers and fosters relationship with existing ones
- Supports credit analysis and the decision making process related to new business opportunities and credit risk exposure.