



360 VIEW PROFITABILITY

*Understand & Grow Your
Customer Relationships*

Your team needs a clear and comprehensive view of relationships and profitability to be equipped to win client trust and maximize cross-sell opportunities. Give them the power to see the value of accounts and strategic steps to grow strong relationships.

Between core banking and ancillary systems, most institutions struggle to see the full view of the customer that would reveal profitability and inform growth strategies. Banks and credit unions need insight into the entire relationship with the customer and their overall profitability to drive effective customer service, sales efforts, and organizational growth.



Silver Dollar Sales Inc

95 CUSTOMER

CUSTOMER LEVEL: *Platinum*

NET PROFIT: \$163,611.82

KEY BENEFITS

View customer and account level profitability to understand your top customers and their trends. 360 View Profitability utilizes funds transfer pricing and provides complete transparency so users can understand each calculation. See month-to-date profitability statements, 24-month trends, and customer rank—use this information to better build your next customer retention campaign.

- Quickly know the value of your accounts and household relationships
- See customer ranking, trends, and month-to-date profitability
- Beyond just the customer's account balance, see true account profitability
- Get hard costs import from account and soft cost allocations
- Know that data is based on your cost to do business, not an industry standard
- See a customer's value over time
- Create retention programs around your best customers
- Build growth programs to develop your unprofitable customers