



Wipfli Connect for Banking

CRM for financial institutions

Banking is a relationship business. But siloed systems make it hard for your business units to share information in a safe, secure way. Customers and members get frustrated, and opportunities are lost when your team can't provide efficient, informed assistance.

Wipfli Connect for Banking is tailored for financial institutions. Integrate your entire organization into one unified platform. Identify and leverage the most profitable relationships, improve cross-sell referrals and delight customers with exceptional service across all touchpoints.

Put customers at the center of your business

Wipfli Connect for Banking creates one simple-to-use interface across all lines of business and branches. Better manage customer information, improve service and keep everyone up to date on each customer interaction.

Get visibility into referrals, sales opportunities, customer life events, products, account balances and next best offers. It's a central point of view that consolidates information from disparate systems, including your core processor, mortgage, investment and insurance systems.

Technology to personalize your financial services, **at scale.**

WIPFLI

Growth for financial institutions

Get a 360-degree-view of your customers or members to identify and leverage your most profitable relationships.



Relationship management

Get complete information on every customer or member in one central place so you can deliver quality, personalized service with every interaction. Create visibility across business lines and provide holistic service.



Workflows

Increase team productivity. Improve workflow by automating manual tasks, eliminating repetitive data entry and streamlining processes across each financial function.



Marketing automation

Track customer/member engagement to create meaningful, relevant communication that strengthens your relationships. Automated marketing tools help you present insightful, timely service for each customer/member. Track leads and referrals and ensure new opportunities are pursued in a timely manner. Retain prospect information for future sales and marketing campaigns.



Reports and dashboards

Visualize complex data and keep track of key metrics. Wipfli Connect for Banking comes prebuilt with intelligent reporting tools for sales, marketing, team performance and more. Turn data into actionable insight.



Security

Assign roles and restrict permissions so users only have access to essential information. Keep sensitive customer data safe from unauthorized access.



Integration

Built on the Microsoft Dynamics CRM, Wipfli Connect for Banking integrates with the entire Microsoft suite and many third-party applications. Get a familiar interface that works with the tools you already use.

Let's get started

Find out how you can build customer loyalty and grow your market share with Wipfli Connect for Banking.

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