

Salesforce Lead & Referral Engine For Retail Banks

Giving retail banks a single customer view across every channel and touch point.



Optimal Lead and Referral Management for Banks

Are you leaving money on the table?

\$1.5 Billion

Is the revenue opportunity forgone by the largest banks if they do not invest in an optimal lead and referral engine - medium size banks forgo a revenue opportunity of +\$500M*

*customer statistic.

The Leads and Referral Engine solution enables small and large banks to intake, distribute, manage and nurture leads from any channel, business line, or product and convert them to new accounts.

Score - Route - Assign - Action - Close

-  Hot leads are route to the right banker in real-time so that action can be taken immediately.
-  Warm leads fall into the queue right behind hot leads to ensure time is spent on the most valuable opportunities first.
-  Cold leads are sent to the bottom of the queue but relevant information as part of a email nurture campaign.

Boost Your Cross-Sell Ratio With A Referral Engine

The Lead and Referral Engine allows referrals to be seamlessly shared across lines of business increasing your bank's cross-sell ratio which both grows the profitability of the relationship and the lifetime value of the customer.

