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MicroMac | Banking Solution Provider



Priority Banking Management Solution

Priority banking is relatively new in Bangladesh. In this form of banking, the bank identifies its priority customers and some special benefits are provided to these first class customers by the bank. Example: They do not have to wait in the queue for transactions. They are assigned client relationship managers to take care of all their banking needs. These customers can use banks premises for holding meetings, can access the Internet free of cost and several other benefits are also provided. The basic purpose of this form of banking is to make the experience of banking hassle free and less time consuming. This is not to be confused with wealth management where the thrust is on providing first-class customers, customized services and expert advice on various financial needs. This is generally carried out by the wealth managers of the bank. However priority banking as part of its service offerings may include wealth management. To manage priority banking MicroMac has developed an application named Priority Banking Management Solution (PBMS).

PBMS – a Web Based Application

PBMS is a complete web based application. The system needs only be installed on the server placing minimal requirements on the end user workstation. This makes maintaining and updating the system much simpler as usually it can all be done on the server. Any client updates can be deployed via the web server with relative ease.

What PBMS do for your business?

- Store information about leads, opportunities and customers so that all the people involved stay informed
- Act as a central shared system for contacts, calendars and files
- Email and SMS reminders to make sure that you never leave a prospect behind
- Smooth management and tracking of service request status
- Determine the effectiveness of marketing, industry segments or pretty much anything else
- Integrate into your existing workflow
- Save man-hour and reduce administration costs
- Gain customer satisfaction through quick service
- Management time savings through single window monitoring
- Administrative time savings through performance reports
- Increases visibility and transparency

PBMS Client Reference

PBMS is successfully running at The City Bank Limited and Eastern Bank Limited.



Features of PBMS

User Module

PBMS has an extensive user module. Besides create/edit/delete users there will be option to set user privilege. Roles, a way of assigning specific permissions to a group, allow fine tuning the security, use and administration of PBMS. Users assigned to the role, or group, are granted those permissions assigned to the role. Users access only the data and functions they are permitted to.

The users of the software will be the following individuals:

- Head of Priority Banking (HoPB)
- Center Managers (CM)
- Relationship Managers/ Customer Service Group (RM)
- Business Development Team (BDT)
- MIS & Portfolio Management Team

User Interface (UI) Management

In PBMS user interface (UI) can be managed, which help user to setup the menu/links as per his requirement.

Customer Registration and Database Management

To get the facility of priority banking customer need to be registered for this service. PBMS will manage customer registration process.

After successful registration/subscription auto email containing a confirmation and thanking letter will be sent to the customer. Besides emailing, SMS can be sent to customer.

Bulk Customer Information Update

Beside single customer information edit there are also options to update bulk customers RM and center information.

Upload Customer Account Balance

PBMS has the option to upload customer accounts balance. At the time to initiate any service request the balance will be checked to meet the required balance to initiate the service properly. Otherwise the service request will be treated as an exception. Option is available to manage the exception service request by higher management approval.

Value Added Services (VAS) Setup

PBMS will have the option to setup the Value Added Services (VAS). By default PBMS has the following VAS setup:

- Meeting in Center
- Lunch in Center
- Travel Concierge Service
- Airport Meet and Greet Service
- Airport Limousines Service
- Property Management Service
- Capital Market Advisory Service
- Share Trading Solution

Parameter Setup

PBMS will have the option to setup the parameters which are used all over the software. By default PBMS has 27 parameters. Beside this, option is available to setup new parameter.

Alarm Clock Setup

PBMS has the option to send automatic email to customer on their expiry of documents. There will be option to setup the alarm clock for the following expiry and reminder:

- Passport Expiry
- Vehicle Tax Token Expiry
- Vehicle Insurance Expiry
- Vehicle Road Permit Expiry
- Birthday Reminder
- Anniversary Reminder

As per the system clock setup expiry and reminder notification email be sent to the respective RM and customer.

Mapping Parameter/Reference

PBMS has the option of mapping parameter data service wise. For example, Meeting in Center VAS only provide from Center1 and Center2 out of 10 centers. In PBMS we can manage it by mapping. When users going to initiate service (Meeting in Center) they will only see two centers (Center1 and Center2) out of 10 centers.

SMS & Email Database Management

PBMS has the facility to send priority customer auto email/SMS wishes on their birthday and marriage anniversary. PBMS maintain a database to send email/SMS based on customer group (age and gender wise).

Dinner Coupon Management

Dinner coupon can be issued for priority customers. PBMS has the facility to manage customer wise issuance of dinner coupon. The coupon will automatically expire after one month validity period. System will keep the status of the coupon validity. If coupon expires then system will not allow updating the status of this coupon as "Customer Redeemed the Coupon".

Automatic Birthday and Anniversary SMS & Email Wishes

PBMS has the features to send automatic birthday and anniversary SMS and email wishes to customers.

Vendor Database Management

PBMS organizes standard vendor information into a single comprehensive system that provides easy access, review and retrieval. Service category wise vendor information will be managed here.

Service Cost Setup

VAS and vendor wise cost can be setup in PBMS.

Priority Center Database Management

There will be several centers in priority banking system. PBMS has the option keep to information of these priority centers.

Service Request Management Module

PBMS has the option to manage service request from initiate to close. The functionalities are:

- Initiate Service Request
- Acknowledgement of Request Acceptance
- Process Request
- Update the Status of Service Request
- Bill Processing
- Close Service Request

Banking Service Request Management

PBMS will only forward the banking service request to respective authority by email. There will be option to provide various statuses to a particular service, such as:

- Service Request by Customer
- Service Provide to Customer

PBMS will preserve all the charges/costs (original charge, charge provide to customer and waiver) at the time of providing any banking service to priority customer.

Appoint Management Module

PBMS has built in Appoint Management module. The system provides a calendar user interface for viewing and editing appointments. In addition, there will be option to update the status of the appointments.

Dashboard

The goal of the dashboard is to automatically show user useful information and other objects as he goes about his day. While RM/BDT processing customer service request the dashboard does its best to proactively find objects that are relevant to their current activity. In PBMS different kinds of dashboard will be developed for different kinds of user groups, such as:

- Dashboard for RM
- Dashboard for BDT Member
- Dashboard for CM
- Dashboard for HOPB

News & Events

PBMS will have its own News and Events section for the users. Admin can add, edit, delete, publish, un-publish news & events with publish & closing date.

Documents Upload

Documents upload option is available in PBMS. This will help to share documentation among PBMS users.

Reports

PBMS has an extensive reporting module. It has also the option to customize the report from user interface. The reporting module covers the following reports:

- Customer Demographic Report
- Passport and Vehicle Documentation (Fitness, TAX Token, Insurance, etc.) Expiry Report
- Report on Birthday and Anniversary
- Banking Service Waiver Report
- Service Usage Rate Report
- Report on Dinner Coupon
- Report on Value Added Service
- Report on Users
- User Log Report
- User Daily Activity Report

Contact Information

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