

PRECEDENCE makes Bank and Priority Customer relation classy

PRECEDENCE is a CRM that makes bank and priority customer relation classy. It simplifies all major areas of priority customer interactions, such as managing contacts, handling service request, reminding customers on their document expiry, wishing customers on their birthday and anniversary, and numerous other tasks. It also has dashboard, analytics and reporting tools to provide business owners with an all-encompassing vantage point of operations.

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
- Integrate into your existing workflow
- Save man-hour and reduce administration costs
- Increased customer satisfaction by reducing MTTS
- Management time savings through single window monitoring
- Administrative time savings through performance reports
- Increases visibility and transparency

PRECEDENCE Client

PRECEDENCE is successfully running at:



Features of PRECEDENCE

Web Based Application

PRECEDENCE is a complete web-based application. This makes maintaining and updating the system much simpler as usually it can all be done on the server. Any updates can be deployed via the web server with relative ease.

Priority Customer

To get the facility of priority banking customer need to be registered for this service. PRECEDENCE 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.

Value Added Services (VAS)

Streamline VAS log resolution through the entire lifecycle and simplify VAS request management from issuance to close including billing. By default, PRECEDENCE has the following VAS:

- Meeting in Center
- Lunch in Center
- Travel Concierge Service
- Airport Meet and Greet Service
- Air Ticket
- Hotel Booking
- Cruise Ticket
- Airport Limousines Service
- Property Management Service
- Capital Market Advisory Service
- Share Trading Solution
- Priority Makeover Service
- Health

Annual Services

Besides VAS, annual services such as birthday and anniversary gift (cake and flower bouquet) can also be managed.

Dinner Coupon

Dinner coupon can be issued for priority customers. Issuance, redemption and automatic expiration of dinner coupon is available in PRECEDENCE.

Birthday & Anniversary Wishes Services

The 'personal touch' really plays an important role for bank to keep its priority customers happy and connected. The birthday and anniversary wishes are ideal ways to show your customers that you care. Just enter birthday dates of priority customers, PRECEDENCE will take care of the rest. System will send an automated SMS based on age and gender to the customer on his/her birthday on behalf of bank. The objective is to keep you close to your customers.

Notification

System sends automatic email and SMS notification to priority customer on their document expiry such as passport expiry, vehicle papers expiry, etc.

Appoint Management Module

Appoint Management Module of PRECEDENCE can do the following:

- Schedule appointment in seconds
- Manage multiple schedules and share appointment information
- E-mail & SMS appointment reminders
- Monitor employee and business performance
- Audit trail to track appointment changes



CBS Integration & Exception Management

PRECEDENCE has integration with core banking software to check customer account balance at the time of initiate service request. If balance is not available the request will be treated as an exception. Option is available to manage the exception service request by appropriate approval.

Customer Life Style

PRECEDENCE stores a wide spread of customer data. This helps to generate customer demographic reports.

User Module

The solution has an extensive user module. Besides create/edit/delete users there will be option to set privilege. Users access only the data and functions they are permitted to. Security is enhanced by IP and MAC based authentication.

Dashboard

The goal of the dashboard is to automatically show user useful information and other objects as he goes about his/her day. While processing customer service request the dashboard does its best to proactively find objects that are relevant to their current activity. Different kinds of dashboard is available for different kinds of user groups.

Contact

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