

Siebel CRM OnDemand

Financial Services Edition—
Wealth Management Solution

SIEBEL
CRM OnDemand

Fast and simple CRM

No upfront costs

Powerful analytics

Built-in contact center

Easy to integrate

Prebuilt industry solutions



Grow Production and Assets Under Management

Introducing Siebel CRM OnDemand—an innovative customer relationship management (CRM) solution from the world's leading CRM vendor, served up on demand by IBM e-business Hosting™.

Fast and simple CRM—With Siebel CRM OnDemand, you get the best in CRM reflecting more than a decade of customer experience, and you will be up and running in minutes.

No upfront costs—There's no software to install. No hardware to buy. No maintenance, upgrade, or support costs.

Powerful analytics—Siebel CRM OnDemand provides the industry's most powerful analytics to obtain deep customer insight for your business.

Built-in contact center—Siebel Contact OnDemand provides agents with the industry's first powerful hosted contact center capabilities, regardless of their location. This is an optional built-in component.

Easy to integrate—Siebel CRM OnDemand seamlessly integrates with other systems using both XML/SOAP Web Services standards and prebuilt integration solutions.

Prebuilt industry solutions—Industry-specific editions with customized data models, business processes, and user interfaces will meet your unique needs.

Multilanguage and multicurrency support—Siebel CRM OnDemand supports all the major languages and currencies to enable you to deploy globally.

Rock-solid reliability—IBM e-business Hosting Centers safeguard and maintain your data 24x7 in a security-rich and reliable environment.

Siebel CRM OnDemand Financial Services Edition—*Wealth Management Solution* is the first hosted CRM solution designed specifically for financial advisors. It enables financial advisors such as insurance agents, financial planners, and wealth advisors to better leverage their clients' profile and portfolio information to identify cross-sell and up-sell opportunities, improve customer retention, and increase wallet share with their customers. Incorporating best practices in the financial services industry, Siebel CRM OnDemand

Financial Services Edition—*Wealth Management Solution* empowers advisors with the tools and insight to ultimately maximize their production and assets under management.

IMPROVE REFERRAL MANAGEMENT EFFECTIVENESS

Siebel CRM OnDemand Financial Services Edition—*Wealth Management Solution* enables a seamless process for financial advisors to actively track referrals and leads. Starting with the contact profile, advisors can view all referrals made by a particular client. As

Access key household information

Analyze household financial profile

Track household investment risk profile

The screenshot displays the Siebel CRM OnDemand interface for a household named 'Young'. The interface is organized into several sections:

- Key Household Information:** Household Name: Young; Primary: Mark Young; Home Phone: 1 (855) 555-1254; Time Zone: (GMT-08:00) Pacific Time (US & Canada); Tijuana; Household Currency: USD.
- Household Detail Information:** Type: Empty Nest; Segment: High Net Worth; Last Activity: 7/20/2004; Primary Contact DOB: 8/15/1950.
- Additional Household Information:**

Primary	Alternate
Country: USA	Country: USA
Address 1: 12 Main Street	Address 1: P.O. Box 40089
Address 2:	Address 2:
City: San Mateo	City: San Mateo
Province: CA	Province: CA
Post Code: 94403	Post Code: 94403
Description:	Modified By:
- Household Financial Profile:**

Total Income: \$25,000	Total Expenses: 200,000
Total Assets: 2,000,000	Total Liabilities: 650,000
	Total Net Worth: 1,450,000
- Investment Risk Profile:**

Risk Profile: Moderate	Current Investment Mix: Conservative
Experience Level: Good	Objective: Capital Preservation
Investment Horizon: Medium term	Primary Goal: Estate planning

advisors log each referral, new leads are immediately created, which ensures that referrals do not get lost in the system, thus improving follow-up rates and referral effectiveness.

OBTAIN CONSOLIDATED PROFILE OF HOUSEHOLDS

Siebel CRM OnDemand Financial Services Edition—*Wealth Management Solution* provides advisors with a complete 360-degree view of a client's household with full understanding of each household's financial and investment risk profile, including consolidated portfolios, leads, opportunities, notes, and tasks for each contact in a household. This provides advisors instant access to important client information needed to effectively cross-sell and up-sell additional financial services products or to serve clients.

ACCESS COMPREHENSIVE UP-TO-DATE CLIENT PORTFOLIOS

Siebel CRM OnDemand Financial Services Edition—*Wealth Management Solution* provides advisors convenient access to a client's comprehensive portfolio, including brokerage accounts and life insurance policies, so that they can deliver accurate, relevant, and customized advice to their clients. It also enables advisors to obtain extended profile information or print out comprehensive up-to-date client summaries to take with them to customer meetings. With Siebel CRM OnDemand Financial Services Edition—*Wealth Management Solution*,

financial advisors no longer need to wrestle with incomplete, inaccurate, and scattered information about their clients' portfolios, but will instead now have full customer insight at their fingertips.

IMPROVE ADVISOR LOYALTY

Siebel CRM OnDemand Financial Services Edition—*Wealth Management Solution* incorporates several best-practice business processes, which make it easy for advisors to access important contact, household, and portfolio information to provide personalized service to their clients. Industry-specific enhancements tailored to financial advisors, combined with market-leading core CRM capabilities, equip advisors with the sales productivity and effectiveness tools to maximize business performance. Since ease of doing business is a key factor in cultivating and maintaining advisor loyalty, providing an intuitive and easy-to-use CRM solution will result in improved advisor loyalty.

Bottom Line

By offering compelling industry-specific enhancements and embedded best-practice business processes to improve sales effectiveness, Siebel CRM OnDemand Financial Services Edition—*Wealth Management Solution* enables advisors to better attract and retain customers and increase revenues, and maximizes your return on investment.

Key Features

Referral Management

- Automatic lead creation
- Ability to view all referrals made by a particular client

Household Management

- Single household view
- Tracking of household, financial, and investment risk profiles
- Consolidated portfolio, leads, opportunities, notes, and tasks for all contacts in the household

Portfolio Tracking

- Consolidated book of business tracking
- Household-level portfolio tracking
- Contact-level portfolio tracking

Lead and Opportunity Management

- Easy lead creation, assignment, and qualification
- Lead and opportunity revenue tracking

Contact Management

- Single view of client book of business
- Tracking of financial and investment risk profiles
- Consolidated portfolio, leads, opportunities, notes, and tasks

Email Integration

- Integration with Microsoft Outlook
- Automatically link incoming and outgoing emails with associated contacts, accounts, leads, and opportunities

The Siebel CRM OnDemand Advantage

Siebel CRM OnDemand industry solutions are built leveraging Siebel's ten-plus years of experience across 23 industries and IBM's deep industry insight. Based on this extensive domain expertise, Siebel CRM OnDemand Financial Services Edition—*Wealth Management Solution* is uniquely designed to deliver wealth management-specific capabilities at the user interface, data, and process levels that are not available with any other hosted CRM offering.

Additionally, Siebel CRM OnDemand industry solutions provide customers with flexible deployment options: They can be deployed as complementary extensions to Siebel's world-class on premise industry solutions or as complete stand-alone solutions.

IBM–Siebel Alliance

Since 1999, IBM and Siebel Systems have collaborated on more than 1,900 CRM engagements, setting industry standards for effective systems deployment, consulting, hosting, and solution development.

The companies are currently developing new, integrated solutions based on the IBM WebSphere® platform, the IBM on demand operating environment, and Siebel CRM applications, enabling customers to dramatically strengthen customer relationships while reducing IT costs. That same commitment to high-quality, low-cost CRM with usage-based pricing is the driving force behind Siebel CRM OnDemand.

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