

The Rise and Fall of a CRM System

The Case for CRM Investment

- 74% of businesses improved access to customer data with a CRM.*
- Businesses using CRM software experience a 300% increase in conversion rates.*
- Companies that invest in CRM see an average return of \$8.71 for every \$1 spent.*

What Financial Institutions Gain from a CRM System:

Transform into a customer/member-centric organization:



A Well-Designed CRM will Positively Impact the Following Areas in a Bank or Credit Union:

- ✓ Data
- ✓ Analytics
- ✓ Engagement
- ✓ Branches
- ✓ Sales Staff
- ✓ Digital Channels
- ✓ Traditional Channels

Why CRMs Fail

37.1% of banks have had minimal adoption and understanding of CRM systems they implemented.**



Engage fi Helps Financial Institutions:

- Choose a CRM for the right reasons, aligned with strategy and culture
- Define a clear roadmap for customer/member-centric transformation
- Gain measurable value from day one (adoption, engagement, and ROI)
- Trust that the CRM will drive loyalty, growth, and operational efficiency

Learn more at www.engagefi.com.

*<https://www.demandpage.com/crm-statistics/#text=Surfacing%20the%20information%20that%20will%36%25>
**<https://bankingjournal.aba.com/2024/06/harnessing-the-power-of-customer-relationship-management/>