EC-Service

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EC-Service provides financial organisations with an integrated, comprehensive and functional software in managing customer relationship, conducting financial planning and tracking investment portfolio

EXcel
TECHNOLOGY

EC-Service

A Comprehensive Wealth Management Sales & Marketing Tool

The Excel EC-Service is not just a financial planner, it has all the components you need in one package to support your wealth management activities such as customer profiling, risk tolerance analysis, investment planning and portfolio tracking.

The major goals of a wealth management business are mainly in two areas: developing a customer base of mass affluent and selling of investment products. EC-Service gives you the tools to build up this new customer base through campaign and leads management functions, and to sell them various investment products through a structured approach of financial planning and need analysis.

- **CRM Integration**

Wealth management systems have to work with your customer relationship management (CRM) system to make the best use of customer and prospect information available. EC-Service allows name lists generated by your CRM system or other systems to be imported for prospecting and marketing work. Activity results can also be fed back to your CRM database for further analysis.

- **Serving the Mass Affluent & High Net-Worth**

The wealth management service to be rendered to your customers can vary considerably. Young professionals may only want advice on investment products and order execution, while the high net-worth may require very personal and tailored services. EC-Service provides functions to support all these different modes of customer service.

- **Step-by-step Approach to Wealth Management**

Returning customers may not need a full fledge financial planning exercise everytime, therefore, EC-Service can be used to market specific investment products to address different needs over a period of time. EC-Service keeps a clear tab of all investments made, together with a full set of history of services rendered, for each customer.

- **The All-in-1 Desktop**

This Desktop is a screen of functions specially tailored for customer service staff engaged in wealth management. It consists of a number of customer service functions such as call list, service log, calendars, alerts, response capture etc. which will greatly enhance productivity of the staff.

- **Leads & Campaign Management**

Lists of prospects, from your CRM system or any external sources, can be imported, filtered, distributed and tracked under the various leads and campaign management functions.

- **Portfolio Tracking**

With appropriate price feed, EC-Service can calculate the market value of customer's investment portfolios. Profit and loss measurements can also be tracked on a regularly basis, say monthly, to enable you to closely monitor the performance of these portfolios and to report to the customers.

- **Financial Planner**

To better understand server your customers, the Financial Planner Module of EC-Service can be used to step them through the various key steps such as cashflow analysis, asset and liability tracking, needs analysis and detailed investment planning.

- **Customer Profiling**

Customer profiling can be achieved by analysis customer responses captured on various sales campaign over time, their investment preferences by walking them through risk tolerance assessment questionnaires with pre-defined questions and the information captured while stepping them through the financial planning exercise.

- **Product Information**

Updating EC-Service with new product information, new campaign and many other parameters can be done easily without programming effort. The system is designed with high degree of user friendliness in mind.

- **Web Interface**

Deployment of EC-Service in an organization would be relatively easy even if remote locations are involved. Its web based user interface allows user to log into EC-Service without the need to pre-install any software.

- **Hardware and System Software**

EC-Service is developed using Java which is of open-architecture. Therefore, EC-Service can practically run on all UNIX and Microsoft Windows NT platforms.

- **System Interface**

EC-Service can talk to other Excel software package to execute trading orders for stocks, ELI product, unit trust etc. It can also talk to the other computer systems.