



## Financial Services

# CASH Opportunity™

Customer relationship management for commercial lending.

**Increase new business development and client retention with a CRM solution that manages the commercial lending pipeline.**

Managing a sales pipeline using Excel spreadsheets or other stand-alone tools can be difficult at best. To better recognize and nurture your most profitable commercial lending opportunities, you need a real-time, enterprise-wide view of potential business from both prospects and existing customers.

CASH Opportunity is a dynamic Customer Relationship Management (CRM) solution for sales and service activities. CASH Opportunity helps commercial lenders accomplish new business development and client retention performance goals by facilitating the planning, tracking, reporting and management of all sales and service activities.

CASH Opportunity is part of CASH Suite™, a powerful commercial lending software solution that helps business lenders increase profits and grow top-line revenue by achieving straight-through-processing across every step of the commercial loan lifecycle. CASH Suite drives increased efficiencies and greater accuracy while reducing operational risk and enhancing profitability.

- View pipeline performance and track new business under development.
- Forecast pipeline opportunities by account representative, business line/unit and time to close.
- Analyze customer history across touch points and identify up-sell and cross-sell opportunities.
- Evaluate past performance history to help predict demand and allocate resources.
- Set business goals and establish streamlined workflow processes.
- Assess key performance indicators to understand the probability of closure and tie results to goals.
- Facilitate communication between departments.

CASH Opportunity provides a CRM solution to manage sales and service activities throughout the commercial loan process. With CASH Opportunity, you can increase the effectiveness of sales and retention efforts and maximize new business from existing relationships.

Easy to use **lead and referral tracking** efficiently helps sales opportunities move through the pipeline.

**Private and shared calendar** integrates with Microsoft® Outlook to consolidate tasks, meetings, targeted close dates, applications, goals and more.

Dynamic **CASH Directory view** of clients, prospects, and referral sources provides a comprehensive snapshot of the entire customer relationship.

**Integration with CASH Reward™ and CASH Profit™** enables updates to risk profiles and pricing details to ensure loans are profitably priced.

Pipeline management capabilities help assess what steps need to be taken to close prospects and clearly shows the progression of opportunities.

Flexible reporting options track referral sources and allow benchmarking against current plan, prior year performance, team results or other custom criteria.

For more information on how CASH Suite and CASH Opportunity can help you strengthen your business lending portfolio and accelerate your success call [800.397.2341](tel:800.397.2341) or visit [WoltersKluwerFS.com/CASH](http://WoltersKluwerFS.com/CASH).

### About Wolters Kluwer Governance, Risk & Compliance

Wolters Kluwer Governance, Risk & Compliance (GRC) is a division of Wolters Kluwer which provides legal, finance, risk and compliance professionals and small business owners with a broad spectrum of solutions, services and expertise needed to help manage myriad governance, risk and compliance needs in dynamic markets and regulatory environments.

Wolters Kluwer N.V. (AEX: WKL) is a global leader in information services and solutions for professionals in the health, tax and accounting, risk and compliance, finance and legal sectors. Wolters Kluwer reported 2016 annual revenues of €4.3 billion. The company, headquartered in Alphen aan den Rijn, the Netherlands, serves customers in over 180 countries, maintains operations in over 40 countries and employs 19,000 people worldwide.

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