Rayterton Banking CRM

Rayterton Banking CRM is a unified platform for managing customer relationships, sales, onboarding, and service in one integrated system. Seamlessly connected to core banking and digital channels, it helps banks improve customer engagement, accelerate growth, and support operational and regulatory processes.

About Rayterton Banking CRM

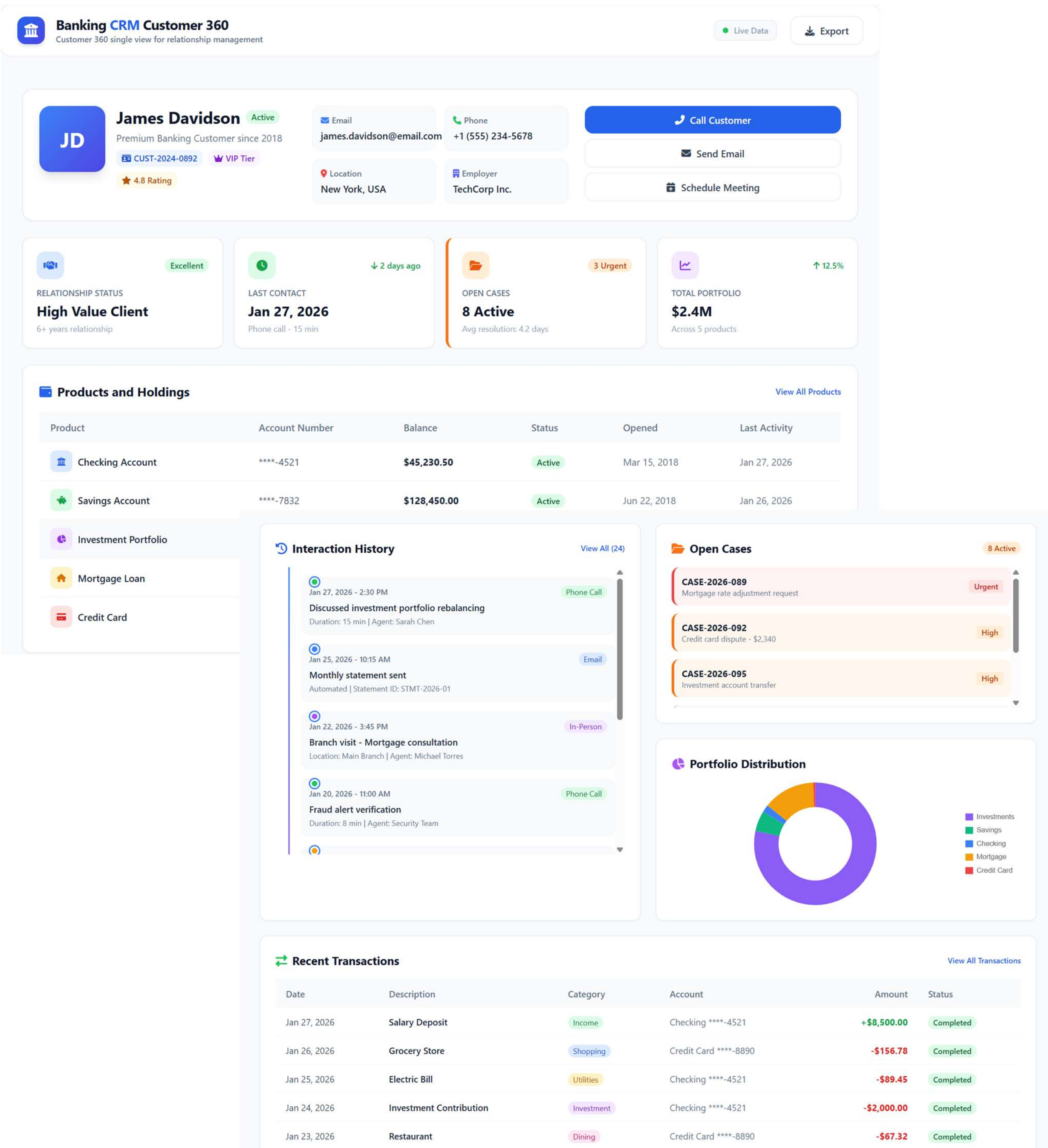
Rayterton Banking CRM is a comprehensive CRM platform designed specifically for banks to manage customer relationships, sales, onboarding, and service operations in a single integrated system. Built with an API first architecture, the platform integrates seamlessly with core banking systems and digital channels, enabling banks to modernize customer engagement without major changes to existing infrastructure. By consolidating customer data, onboarding workflows, sales activities, campaigns, and service operations, Rayterton Banking CRM helps banks improve operational efficiency, accelerate growth, and maintain regulatory readiness.

End to end Operating Story

Rayterton Banking CRM orchestrates the full customer lifecycle, starting from lead capture and onboarding, through relationship management and campaign execution, to service, complaints handling, and performance analytics. A unified customer view ensures that sales, service, and operations teams work from the same trusted data, while configurable workflows and integrations ensure alignment with bank SOP and regulatory processes.

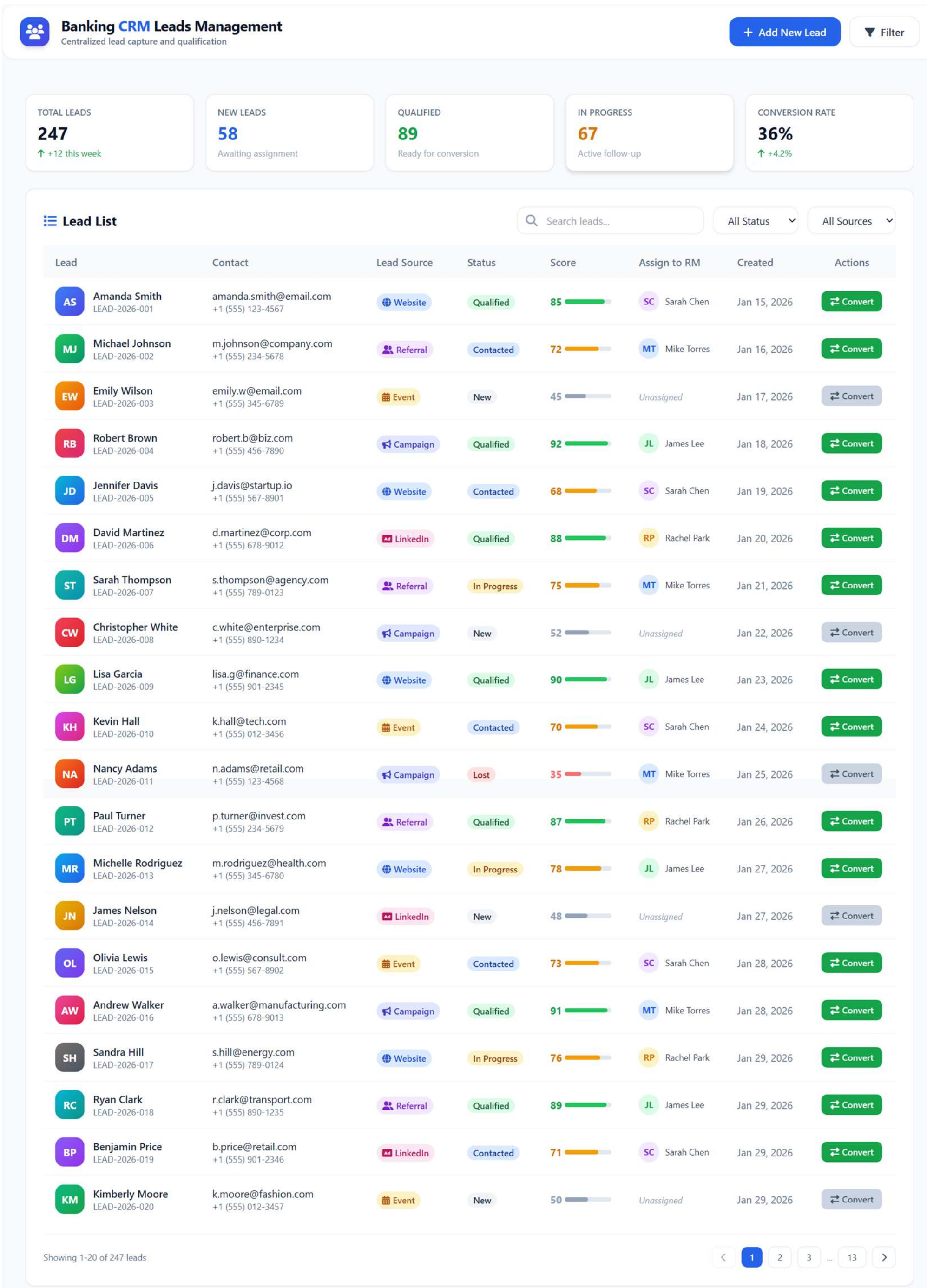
Customer 360 Dashboard

The Customer 360 module provides a complete, unified view of each customer across products, interactions, and service history. It consolidates customer profile data, product holdings, and communication records into a single screen, enabling relationship managers and service teams to quickly understand customer context, ongoing activities, and relationship status.



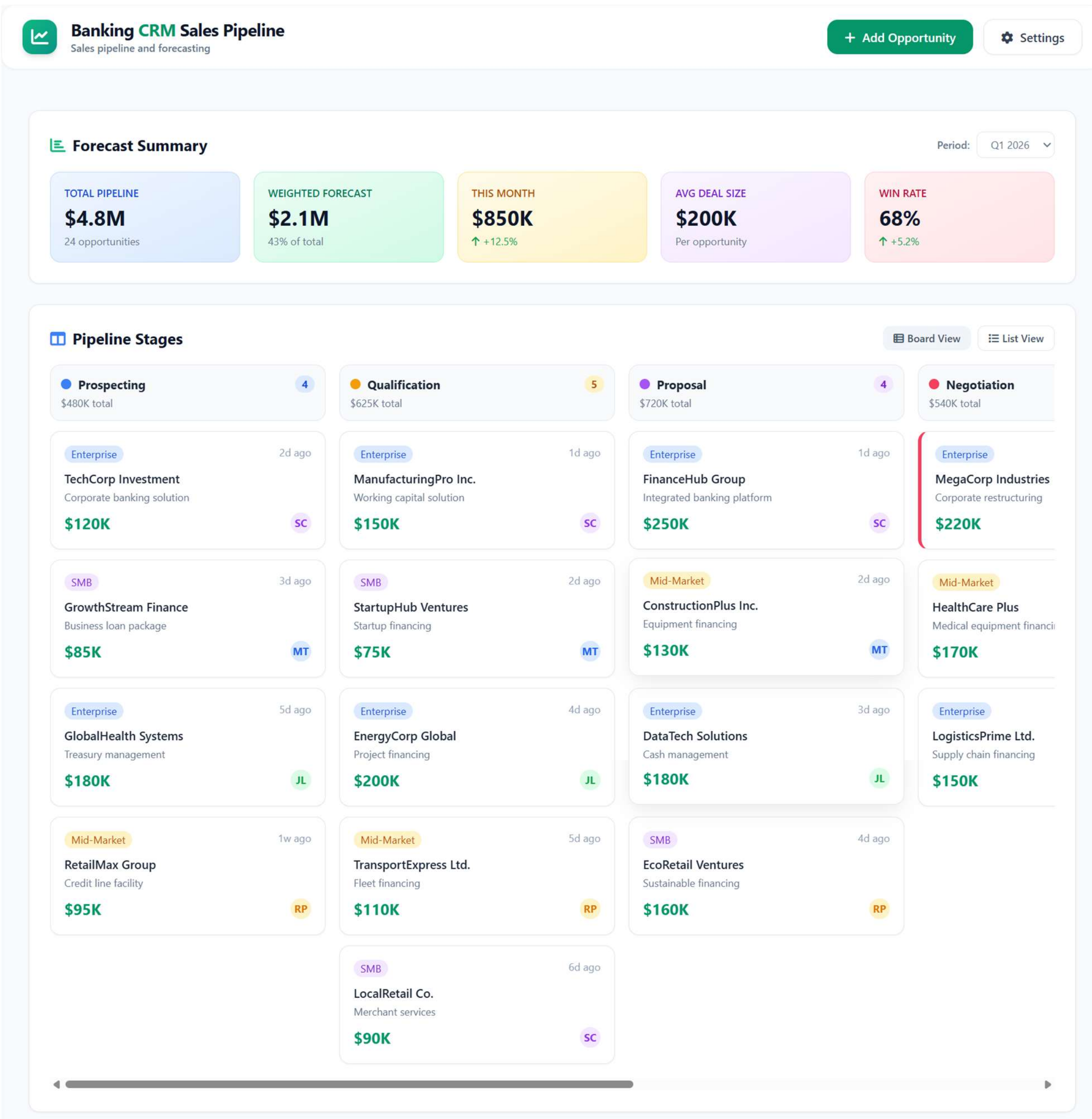
Leads Management and Qualification

The Leads Management module centralizes all incoming leads from multiple sources and supports structured qualification and assignment. It enables teams to track lead status, identify lead sources, and convert qualified leads into sales opportunities, ensuring timely follow up and improved lead to opportunity conversion.



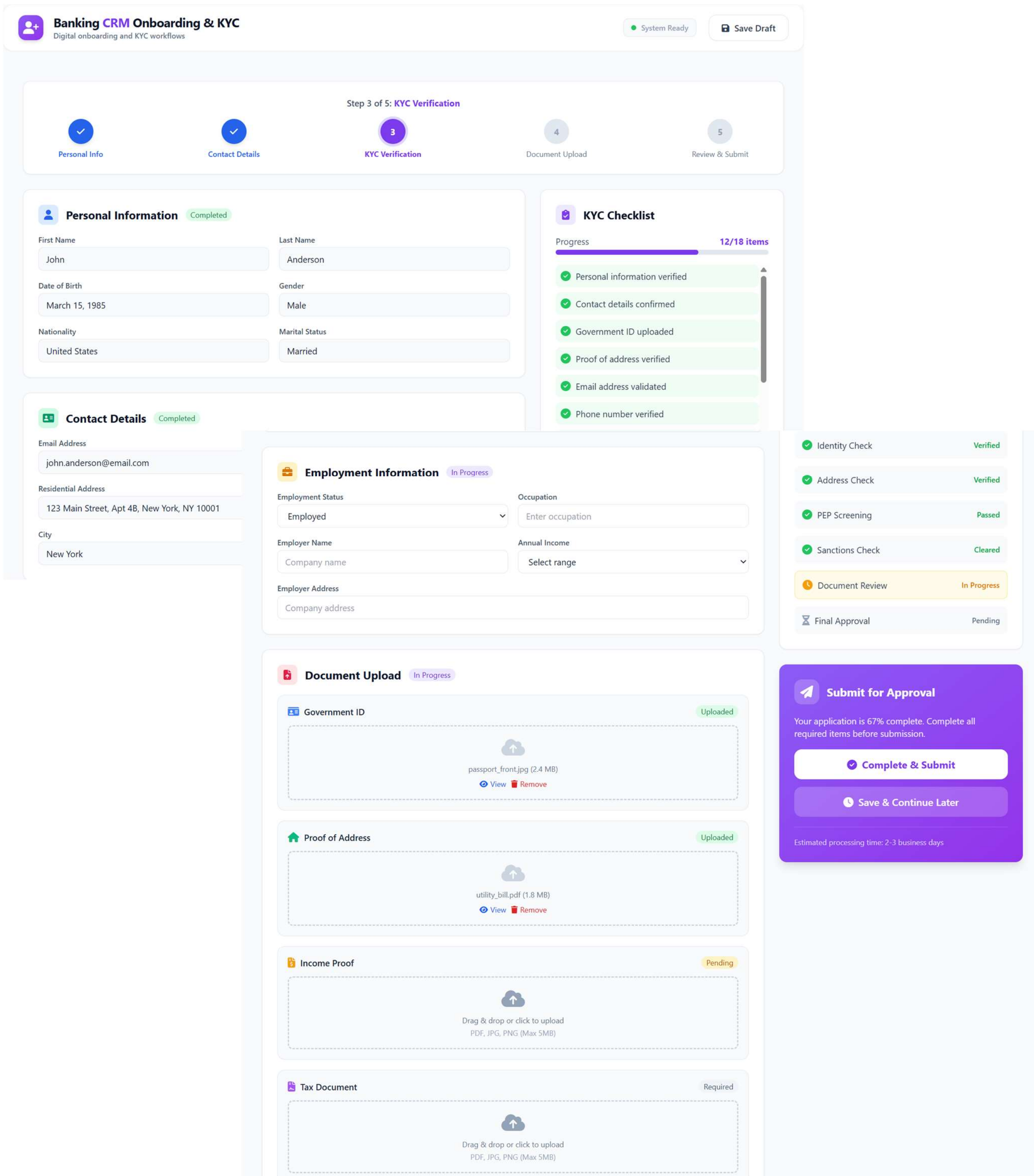
Opportunities and Sales Pipeline

The Opportunities and Sales Pipeline module provides full visibility into the sales lifecycle, from initial opportunity creation to deal closure. It allows sales teams and management to track pipeline stages, monitor deal progress, and review forecast summaries, supporting better sales planning and revenue visibility.



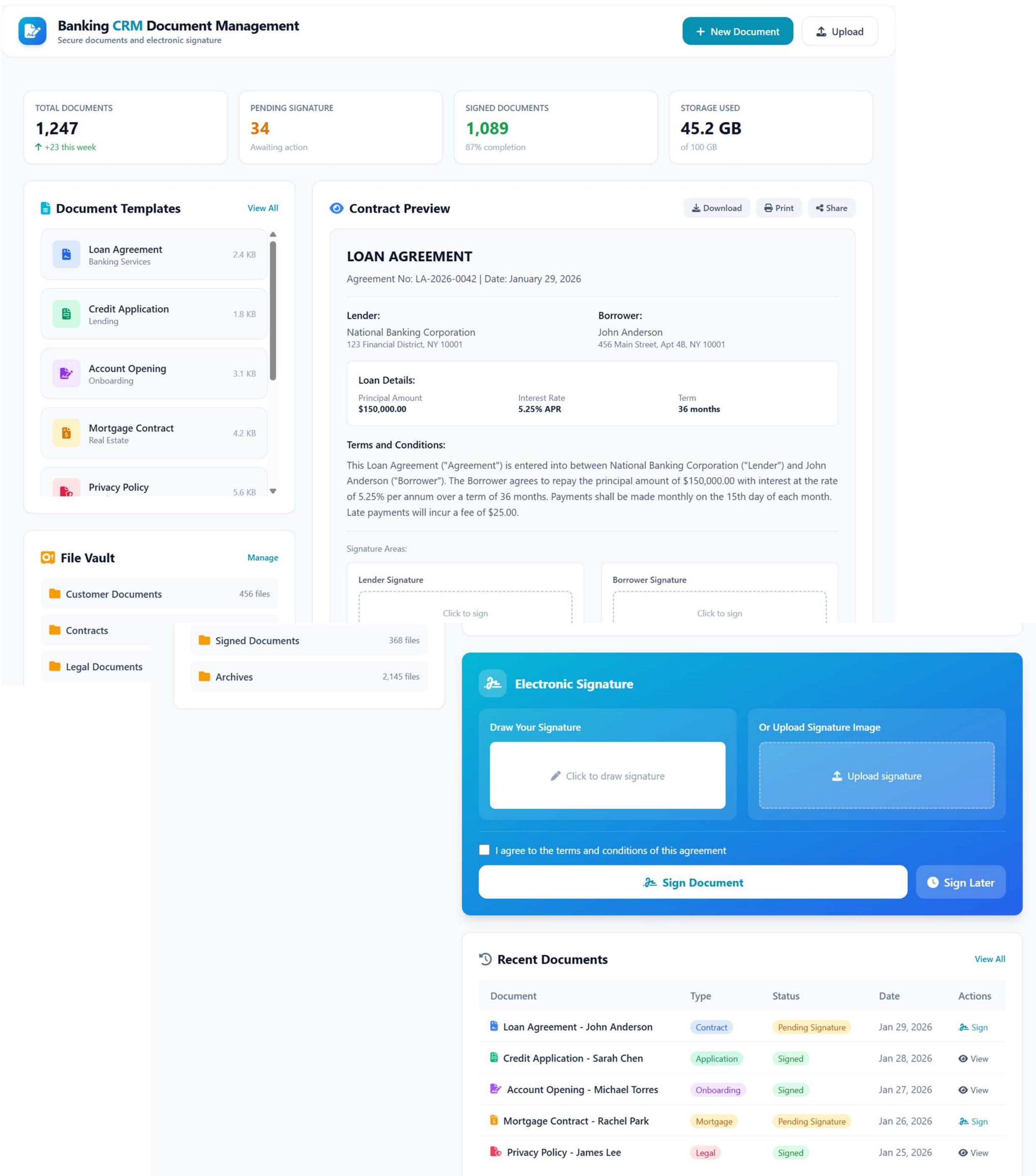
Onboarding Forms and KYC Workflows

The Onboarding and KYC module digitizes customer onboarding and standardizes KYC processes across the bank. It supports multi step application forms, document collection, KYC checklist tracking, and approval workflows, helping banks reduce manual processing while maintaining consistent onboarding and compliance procedures.



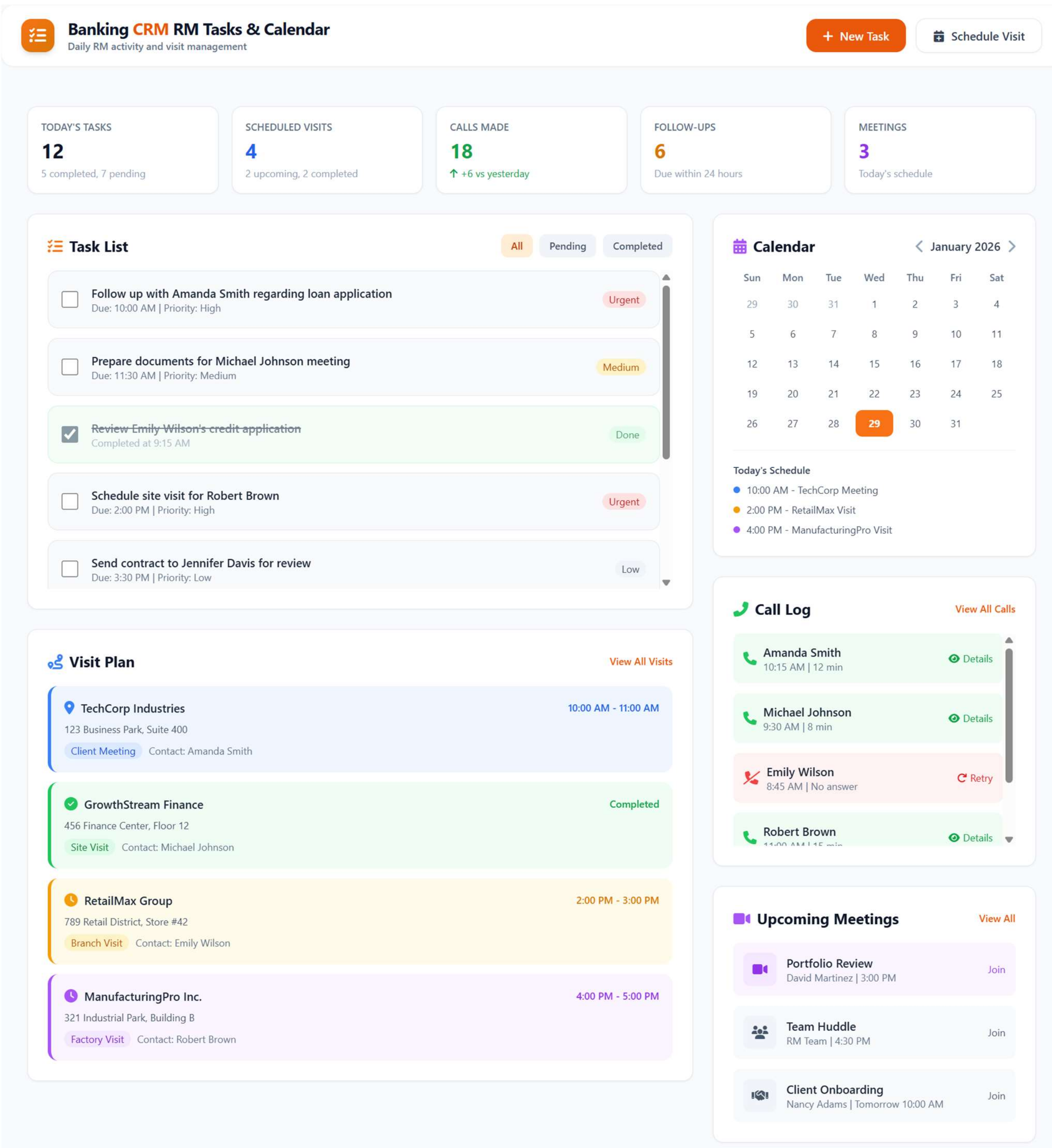
Document Management and eSign

The Document Management and e Sign module enables secure creation, storage, and signing of customer documents. It provides document templates, electronic signature capabilities, and a centralized file vault, supporting faster agreement processing and improved control over customer documentation.



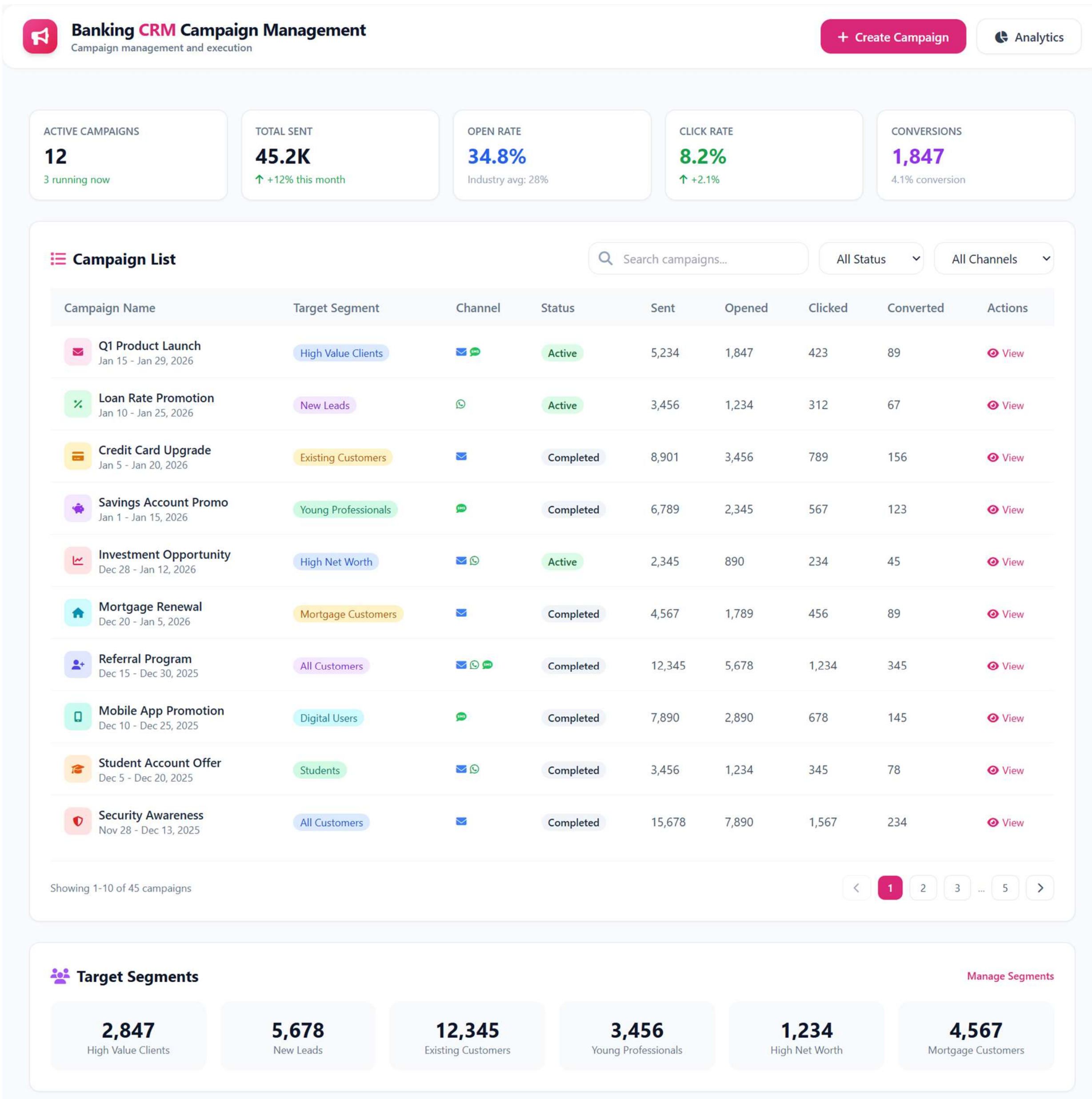
RM Tasks, Visits, and Calendar

The RM Tasks, Visits, and Calendar module supports daily activity management for relationship managers. It enables structured task tracking, visit planning, call logging, and reminders, helping RM teams maintain consistent follow up and improve productivity across customer portfolios.



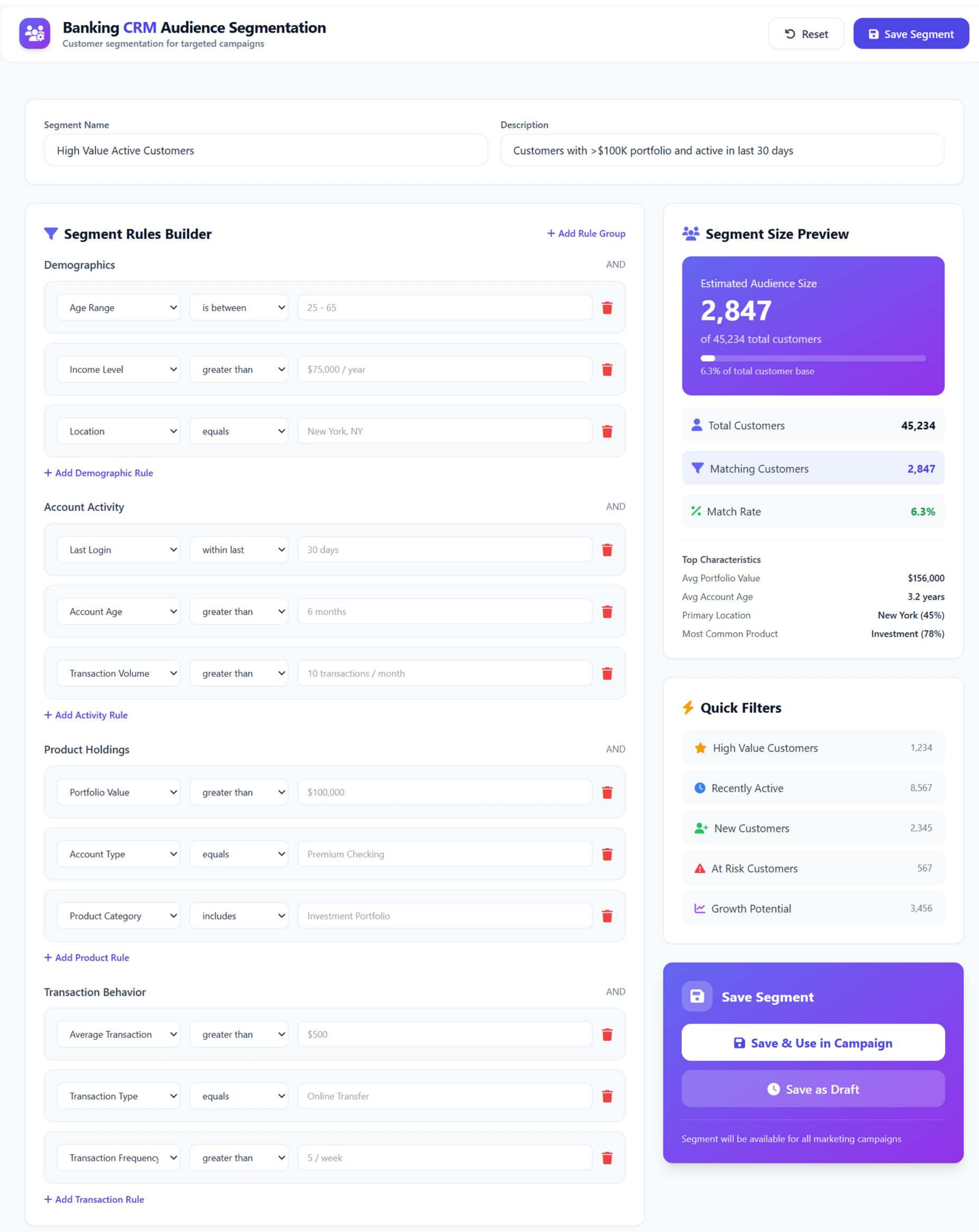
Campaign Management

The Campaign Management module supports planning, execution, and monitoring of targeted marketing campaigns. It allows marketing teams to define target segments, select communication channels, and track basic campaign performance, enabling more organized and measurable campaign execution.



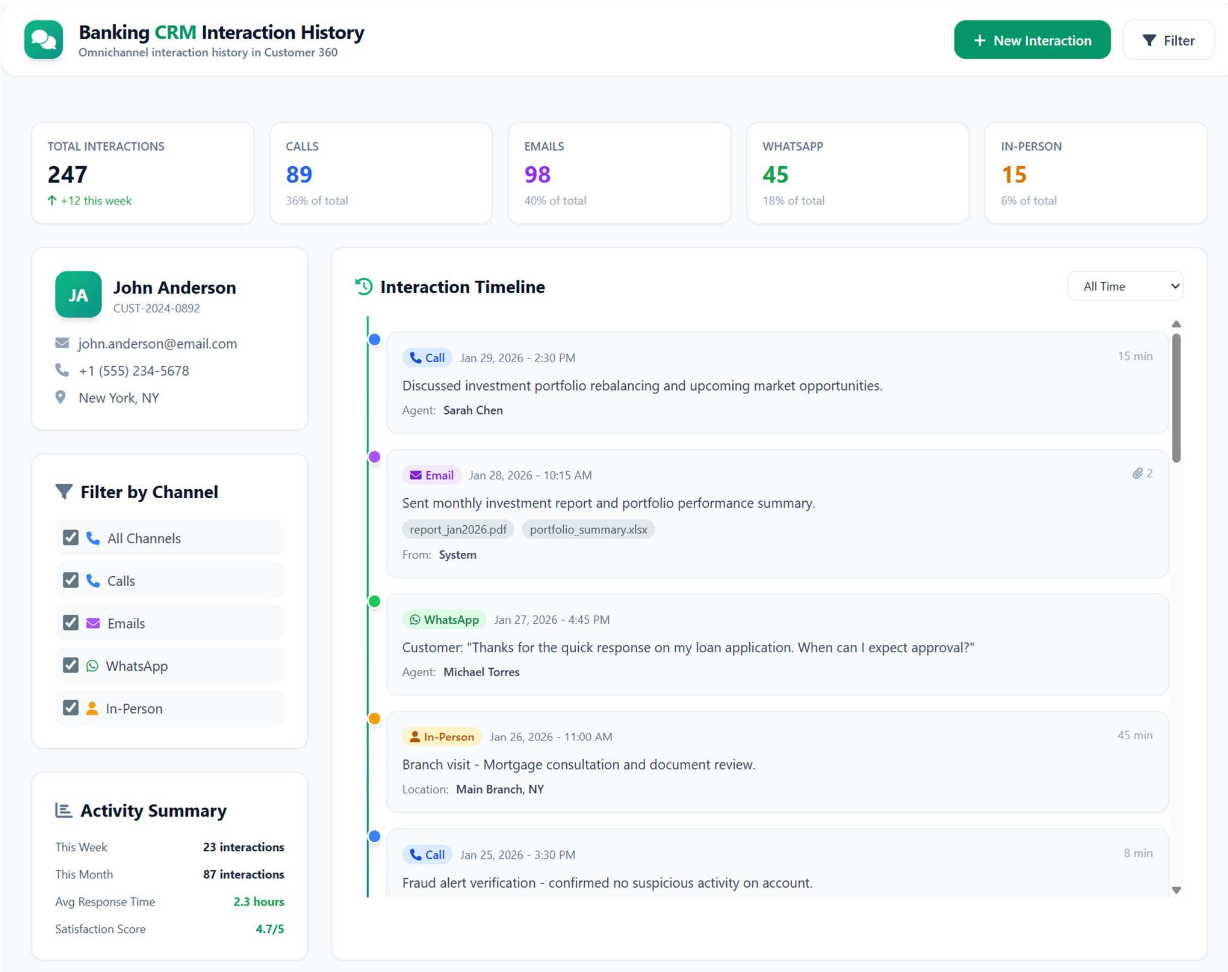
Audience Segmentation

The Audience Segmentation module enables banks to create and manage customer segments based on defined criteria. It supports rule based filtering and segment size preview, allowing marketing and business teams to build targeted audiences for campaigns and customer engagement activities.



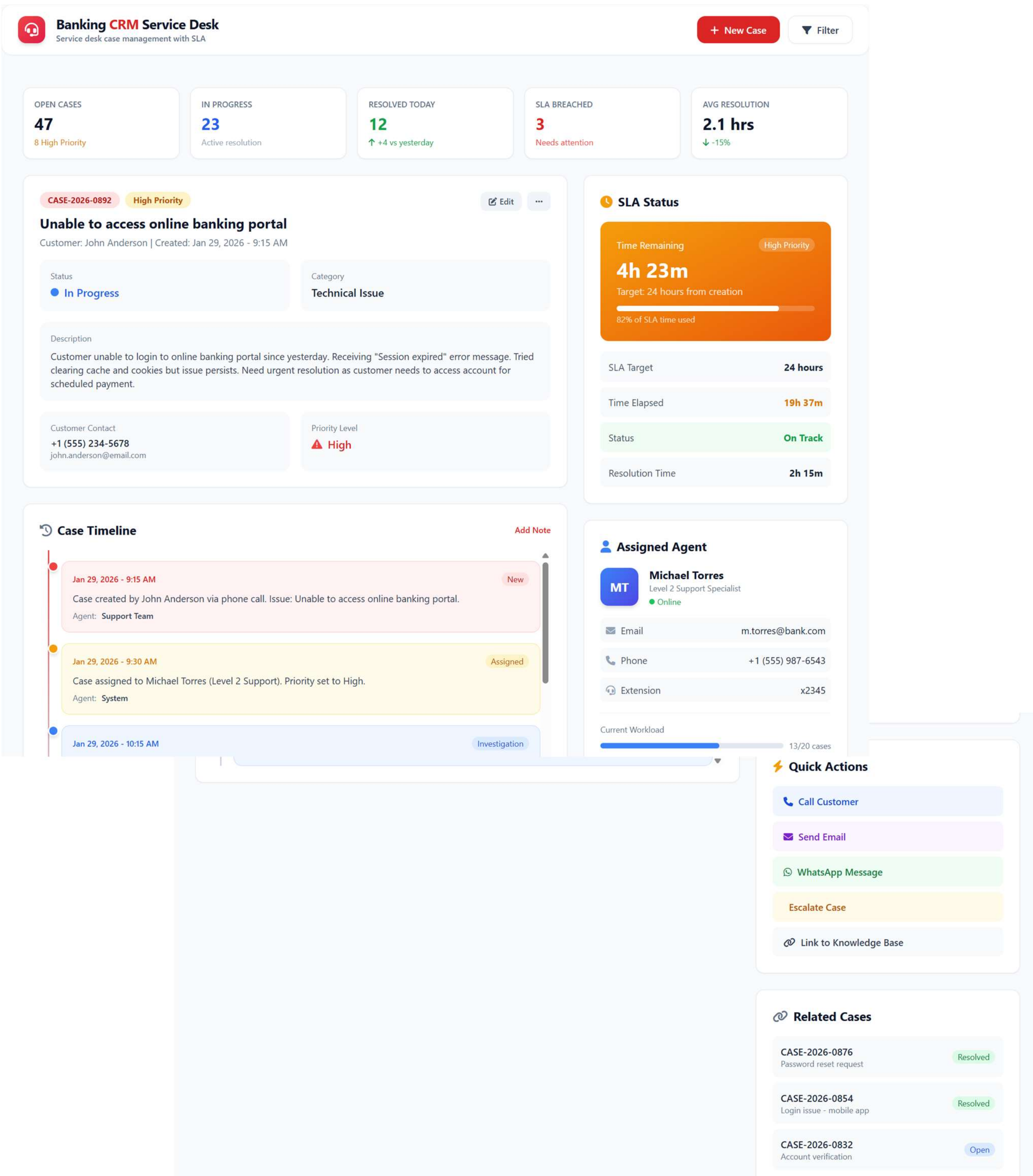
Omnichannel Interaction Log

The Omnichannel Interaction Log captures and displays all customer communications across supported channels in a single unified timeline. It provides visibility into calls, emails, and WhatsApp interactions, ensuring that sales and service teams have full context of prior communications when engaging with customers.



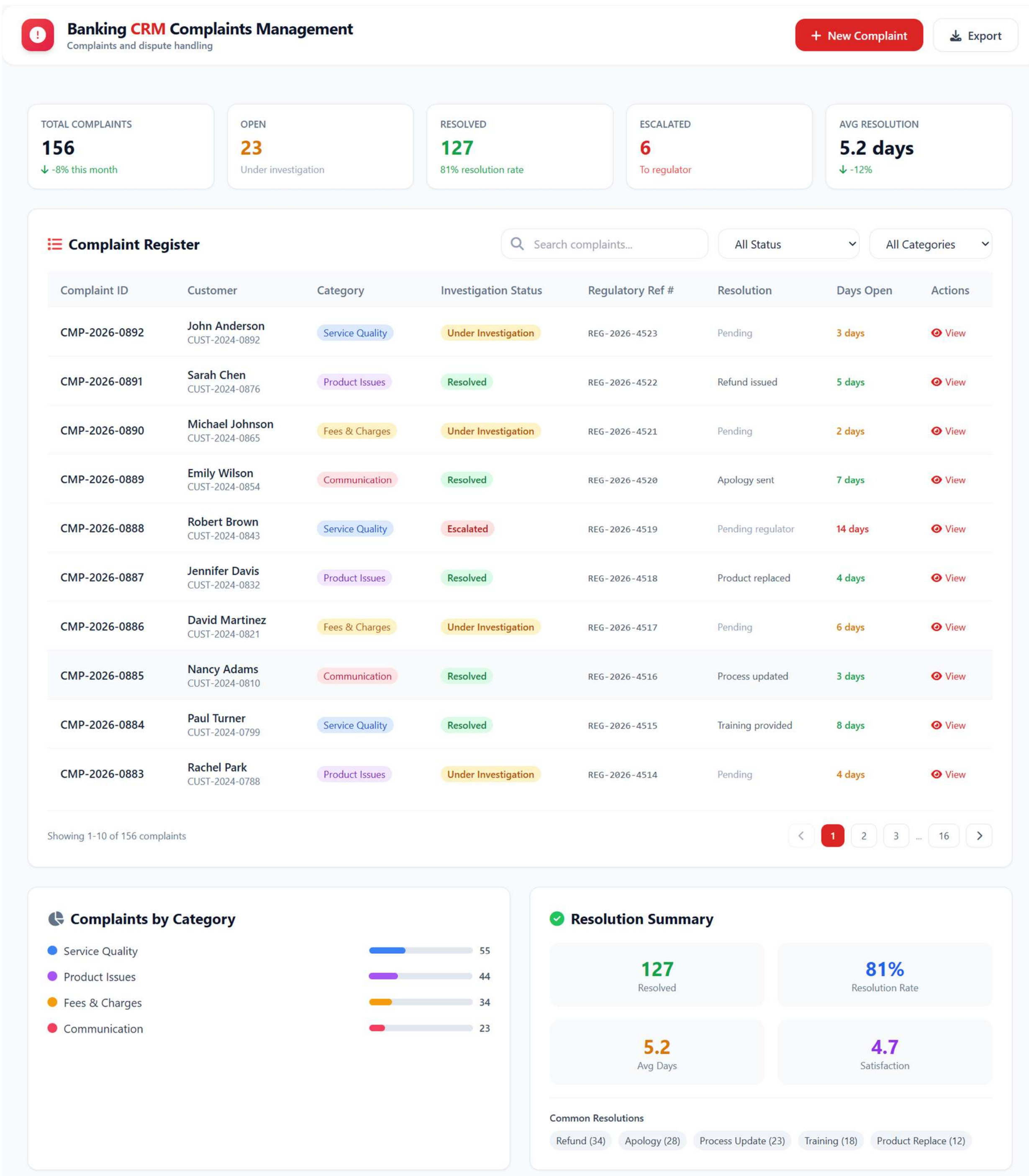
Service Desk and Case Management

The Service Desk and Case Management module provides structured handling of customer service requests and issues. It supports case creation, assignment, SLA tracking, and resolution history, enabling consistent service delivery and improved visibility into service performance.



Complaints Management

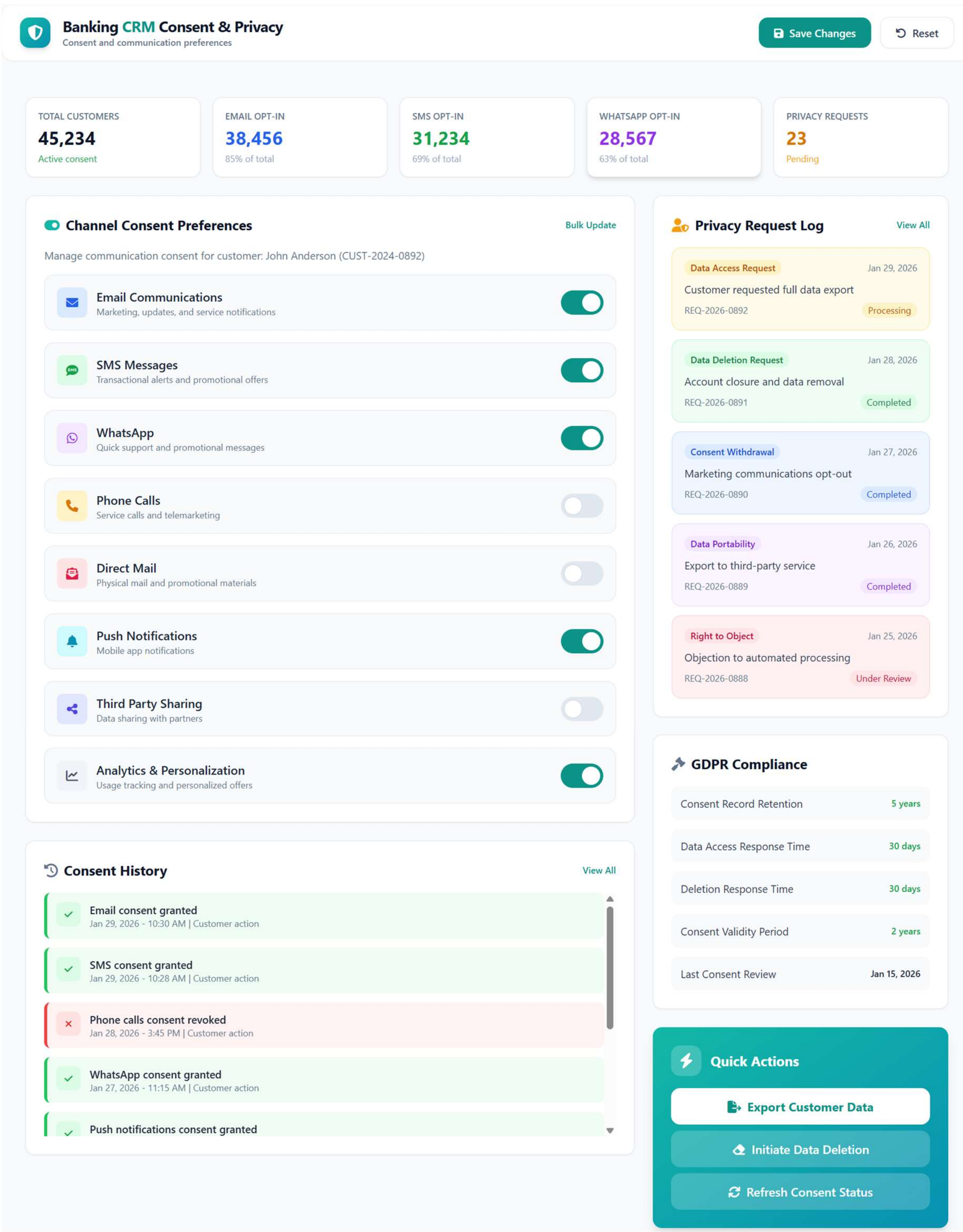
The Complaints Management module supports formal handling of customer complaints and disputes. It enables complaint registration, investigation tracking, resolution documentation, and regulatory reference logging, helping banks maintain transparent and auditable complaint management processes.



Complaint ID	Customer	Category	Investigation Status	Regulatory Ref #	Resolution	Days Open	Actions
CMP-2026-0892	John Anderson CUST-2024-0892	Service Quality	Under Investigation	REG-2026-4523	Pending	3 days	View
CMP-2026-0891	Sarah Chen CUST-2024-0876	Product Issues	Resolved	REG-2026-4522	Refund issued	5 days	View
CMP-2026-0890	Michael Johnson CUST-2024-0865	Fees & Charges	Under Investigation	REG-2026-4521	Pending	2 days	View
CMP-2026-0889	Emily Wilson CUST-2024-0854	Communication	Resolved	REG-2026-4520	Apology sent	7 days	View
CMP-2026-0888	Robert Brown CUST-2024-0843	Service Quality	Escalated	REG-2026-4519	Pending regulator	14 days	View
CMP-2026-0887	Jennifer Davis CUST-2024-0832	Product Issues	Resolved	REG-2026-4518	Product replaced	4 days	View
CMP-2026-0886	David Martinez CUST-2024-0821	Fees & Charges	Under Investigation	REG-2026-4517	Pending	6 days	View
CMP-2026-0885	Nancy Adams CUST-2024-0810	Communication	Resolved	REG-2026-4516	Process updated	3 days	View
CMP-2026-0884	Paul Turner CUST-2024-0799	Service Quality	Resolved	REG-2026-4515	Training provided	8 days	View
CMP-2026-0883	Rachel Park CUST-2024-0788	Product Issues	Under Investigation	REG-2026-4514	Pending	4 days	View

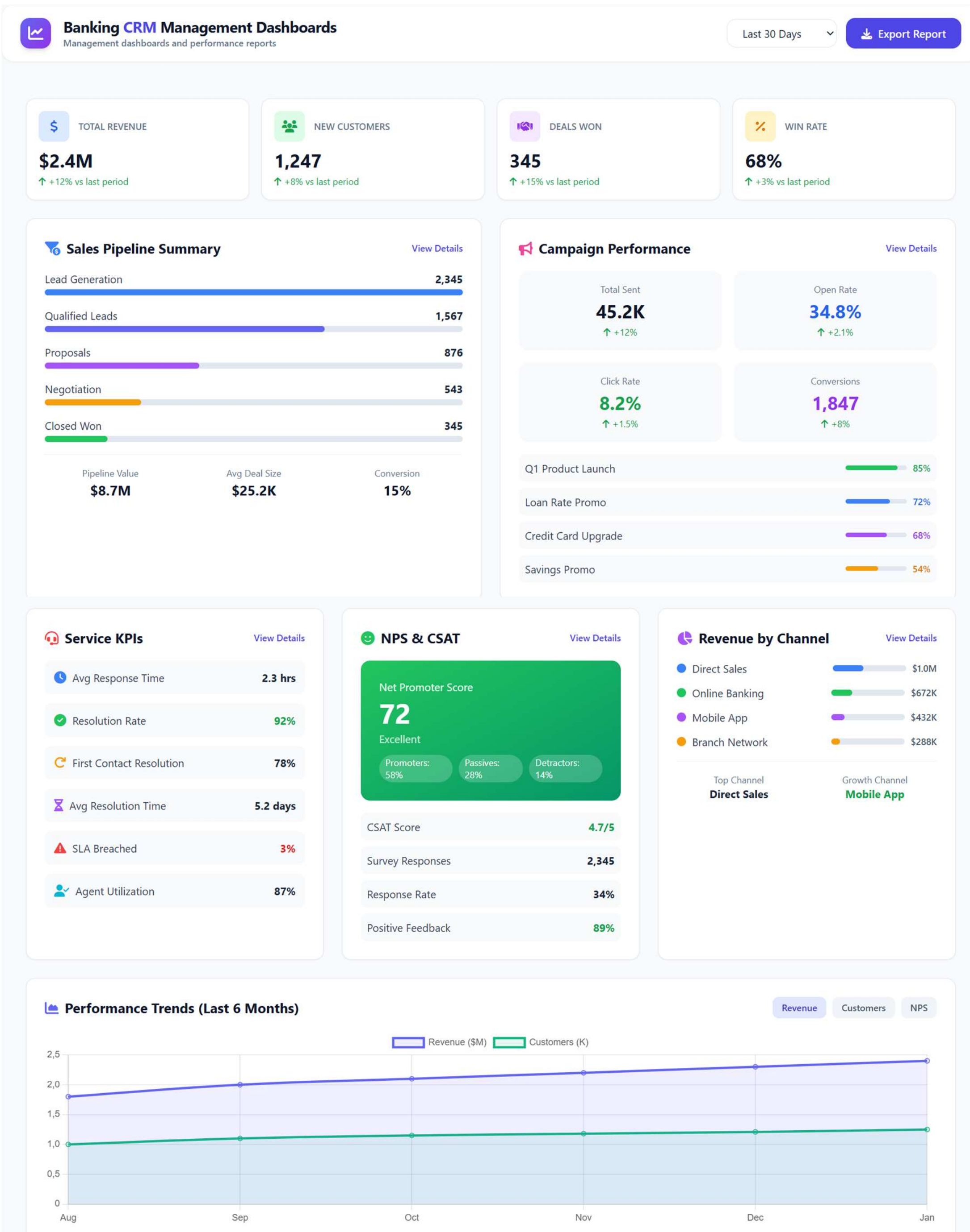
Consent and Privacy Management

The Consent and Privacy Management module supports management of customer communication preferences and privacy related requests. It enables tracking of channel consent, consent history, and privacy request logs, helping banks support compliant communication and data handling practices.



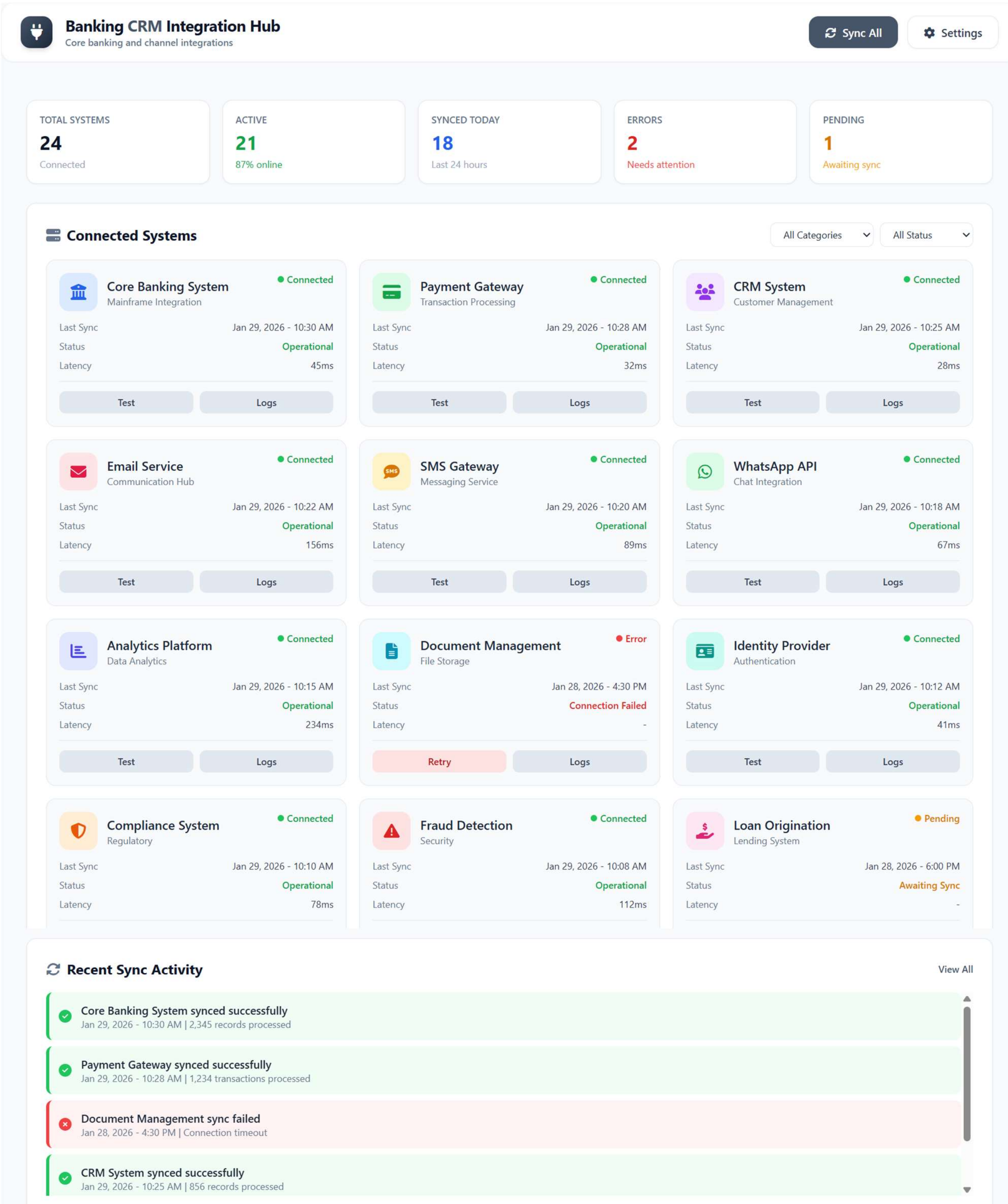
Dashboards and Management Reports

The Dashboards and Management Reports module provides consolidated visibility into key sales, service, and campaign metrics. It supports management dashboards, pipeline summaries, service KPIs, and customer satisfaction indicators, enabling data driven monitoring and performance management.



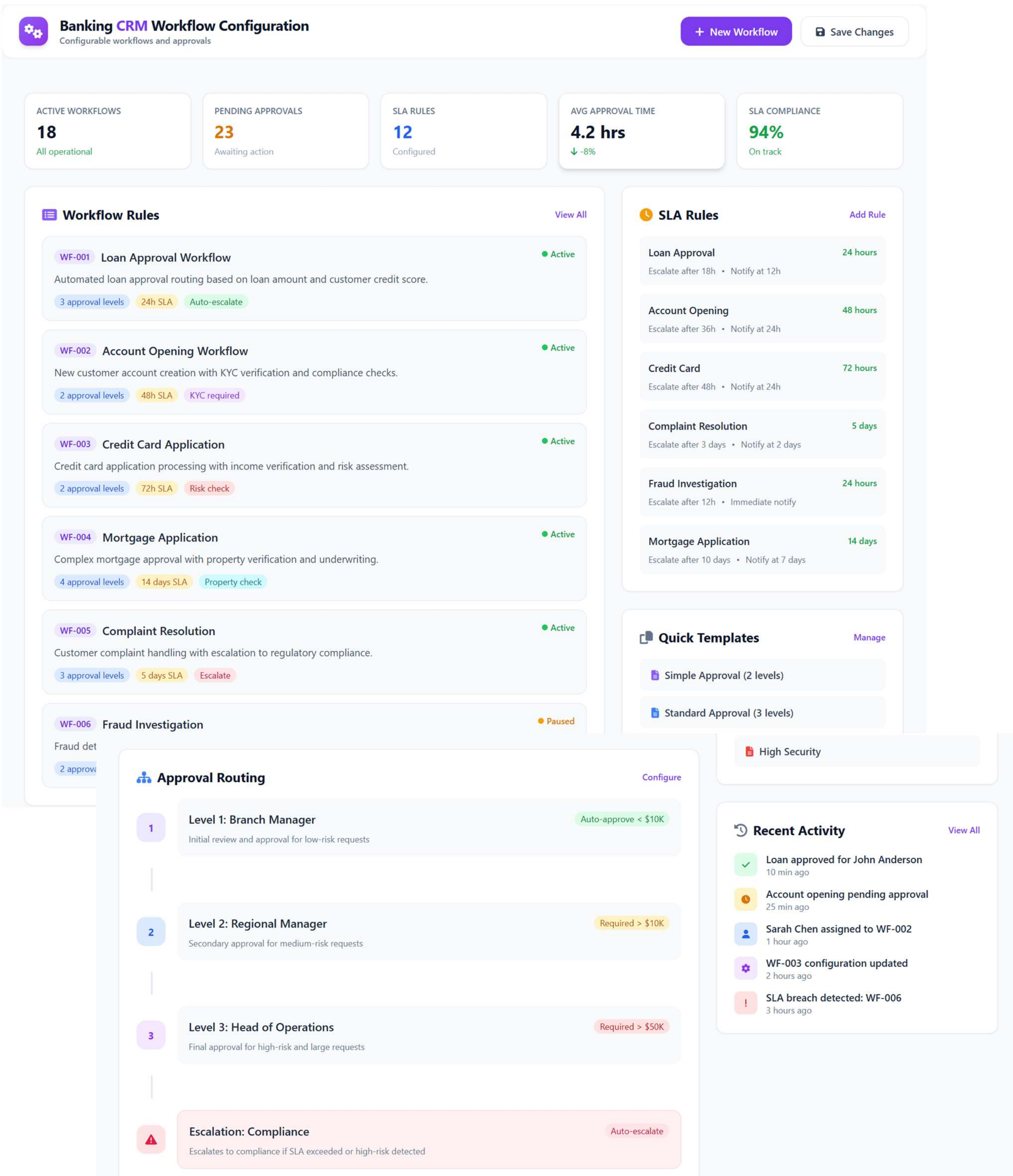
Integration Status and Integration Hub

The Integration Status and Integration Hub module provides visibility into system integrations and data synchronization. It enables monitoring of connected systems, connection status, and last synchronization time, helping IT and operations teams ensure reliable data exchange between CRM, core banking, and channel systems.



Workflow Configuration

The Workflow Configuration module enables banks to configure business processes and approval flows within the CRM. It supports workflow rules, approval routing, and SLA rule setup, allowing banks to align CRM processes with internal SOP and operational policies without heavy customization.



Glossary

API (Application Programming Interface)
A technical interface that allows different systems to securely connect and exchange data.

BI (Business Intelligence)
Tools and reports used to analyze business data and support decision making.

CRM (Customer Relationship Management)
A system used to manage customer data, interactions, sales, and service activities.

CSAT (Customer Satisfaction Score)
A metric used to measure how satisfied customers are with a service or interaction.

CTA (Call to Action)
A prompt that encourages users to take a specific action, such as requesting a demo or trial.

CBS (Core Banking System)
The main banking system that manages customer accounts, balances, and transactions.

e Sign (Electronic Signature)
A digital method for signing documents electronically.

e KYC (Electronic Know Your Customer)
A digital process to verify customer identity for regulatory and compliance purposes.

IT (Information Technology)
Technology systems, software, and infrastructure used to support business operations.

KPI (Key Performance Indicator)
A measurable value used to evaluate performance of business activities.

NPS (Net Promoter Score)
A customer loyalty metric based on how likely customers are to recommend a service.

RM (Relationship Manager)
A bank officer responsible for managing and growing customer relationships.

SLA (Service Level Agreement)
A defined service performance target, such as response or resolution time.

SSO (Single Sign On)
A login method that allows users to access multiple systems with one set of credentials.

Ready to Customize Banking CRM for Your Bank

Share your sales processes, onboarding workflows, service requirements, and integration landscape. Rayterton will configure a working Banking CRM environment aligned to your branding, workflows, and system architecture. This allows your teams to validate functionality and user experience before any commercial commitment.

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About Rayterton

Established in 2003, Rayterton delivers comprehensive Best Fit Software Solutions, server and hardware products, and technology services to a wide range of industries and organizations. Our core expertise lies in Business Process Improvement (BPI), IT Infrastructure, and IT Management.

At Rayterton, we are committed to empowering our clients by enhancing their business operations through tailored IT and management solutions. We combine innovation, experience, and client collaboration to ensure long term success and digital transformation.

Our Competitive Strengths

100% Risk Free	**Best fit to client requirements**	**Easy to customize**	**Software ownership**	**No Change Request (CR) fees during maintenance**

For more information, visit rayterton.com