



Our CRM solution is designed keeping in mind the specific needs of cooperative banks in areas such as cross sell, up sell, customer response management and customer analytics.

## Talisma for Wealth Management

The population of HNWIs and their wealth is growing, especially after the recent economic crisis; wealth management firms are now targeting this highly untapped market, offering HNWIs highly customized services and multiple investment opportunities. As the brokerage and wealth management business transforms from transactional to advisory based, concerns about technology, products, and regulations escalate. The primary focus is on capturing and protecting asset flows and revenues mobilized by wealth transfer, the retirement of the baby boom generation, and the movement of advisors to independence. These shifts take place against a backdrop of intense pricing pressure, globalization, ongoing regulatory scrutiny, and an increasingly demanding customer base.

It comes as no surprise that today's wealth managers need more than just a 360 degree view of their customers. They need insights into behaviour, investment patterns risk concerns and powerful campaign tools to keep customers and prospects updated on new investment avenues. I.e. they need solutions that can help them leverage existing relationships while building new ones through effective campaigns.

## Solutions tailored to your business needs and IT budget

Providing a unified, comprehensive view and in-depth knowledge on high-worth customers, Talisma's powerful CRM solution for the Securities and Wealth Management market delivers the ability to effectively manage extensive client account detail and personal information. The application helps you reap rich dividends from your interaction with prospects and customers and enables you to stay prepared to converse with your target audience, whenever needed. Our CRM application covers messaging via sms, emails and phones. You choose your channel and Talisma will give you a CRM solution for your preferred channel. You retain the option of scaling up and adding other channels as your business grows.

## Grow with your customer

Offering superior levels of customer service and new sales opportunities at reduced IT costs, Talisma offers advanced CRM solutions that take customer relationships to the next level. Aligned with customer expectations for on-demand access to client profile and portfolio information, Talisma CRM for Securities and Wealth Management meets and exceeds industry goals for customer acquisition and retention.

## About Talisma Corporation Pvt. Ltd.

Talisma Corporation Pvt. Ltd. is the leading provider of Customer Relationship Management (CRM) software for a wide range of industries. Talisma CRM enables organizations to deliver an exceptional customer experience on a global scale through traditional and digital communications channels. Talisma solutions improve customer satisfaction by integrating the power of email, phone, chat, SMS text messaging, print, portal, and Web self-service with a robust and mature Web services platform, comprehensive analytics, and a system-wide knowledgebase. With thousands of customers, Talisma serves a variety of industries, including higher education, financial services, travel and leisure, government, business process outsourcing (BPO), and recruiting and staffing. Talisma is a fully owned subsidiary of Campus Management Corp., a leader in enterprise software and services. For more information, visit [www.talisma.com](http://www.talisma.com).

Get Talisma CRM today and differentiate your organization in the increasingly competitive Securities and Wealth Management domain.

- Increased customer retention and satisfaction
- Unified, 360° view of multiple client portfolios
- Improved processes and reduced operational costs
  
- Integrated systems that improve data exchange across silos
- Enables tracking of numerous agents and brokers
- Enables up-selling and cross-selling of different products / services
- Facilitates 'Know Your Customer' (KYC) Regulatory Compliance

To learn more about our solution, please mail Prayukth at [prayukthkv@talisma.com](mailto:prayukthkv@talisma.com) or call us at + 91 80 4039 4400.

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