

# How CRM Ease the Daily Banking Activity

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### In brief

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### What tasks does CRM solve for a bank?

Recently, banks CRM has attracted more and more interest from financial institutions. Studio IT DEV GROUP offers a software product that solves the following tasks:

- Creation of a single client base of existing and potential clients. This will help form a portfolio of offers for a client, study his demand for certain banking products, and keep a history of his appeals to the bank.
- Shortening the terms of consideration of applications for a loan. CRM system for a bank makes it possible to reduce the time for issuing loans significantly. This is because the application processing algorithm is incorporated into the automation system. It "guides" bank employees along the way of considering the application, creating tasks, and reminding them at a certain time of the need to take a specific action.
- Minimizes errors when working with clients. Implementing CRM in the bank makes it possible to enter the necessary information about the client into the database only once.
- Creation of a catalog of banking products. Banking CRM systems developed by our studio make it possible to create a catalog of banking products and, if necessary, make changes to them. Thus, in the hands of every bank employee, there will be an effective tool for selling relevant services and products of a financial institution.
- Easy communication. Our CRM systems for the bank enable bank employees to communicate with each other, exchanging important information and news.

### Integration of CRM into the current IT landscape of the bank

To implement a CRM system in a banking system, integration with related bank systems is required, such as:

- data warehouse for the formation of targeted marketing campaigns, reporting;
- an accounting system for obtaining up-to-date data about customers and their products, as well as for performing transactions;
- telephony, SMS and email gateways for sending messages;
- BI systems for uploading data and building end-to-end reporting on the results of the bank's activities;
- Integration of all sources will allow you to use each interaction with the client as efficiently as possible, increasing the client's LTV and the bank's overall profit per client.

### FIS CRM

The FIS CRM solution is designed specifically for the banking sector, taking into account the specifics of the banking business. With its help, you can: attract customer leads;

- create a profile and structure a database of clients and counterparties for all sorts of parameters;
  - interact through different channels with clients (SMS, instant messengers, e-mail, phone);
  - adapt the bank's product offerings to the needs of specific people;
  - notify employees about events for a specific client;
  - see the entire history of interaction between the bank and the client;
  - keep records of tasks;
  - monitor the KPI of employees.
- FIS CRM will help to put things in order in interaction with customers, simplify many processes, help optimize staff and promote more successful banking products.

## **Why is it important to implement CRM in a bank**

CRM solutions for banks can solve many problems that facilitate the work of employees and promote a banking product;

- software makes it possible to provide customers with a high level of service, necessary and relevant banking products;
- using the automation system it is easy to maintain a high position in the banking services market .

## **References**

1. apiway.ai - categories / crm-for-banks - <https://apiway.ai/categories/crm-for-banks>