

INNOVATING THE FUTURE OF CUSTOMER EXPERIENCE IN BANKING

OVERVIEW

Netiks 360Bank is a powerful banking CRM solution built on Microsoft Dynamics 365, designed to streamline customer engagement, boost sales, and ensure regulatory compliance. It provides a unified 360° view of customers and integrates seamlessly with core banking systems.

The platform supports a digital-first strategy with AI-driven automation, real-time insights, and omnichannel engagement.

KEY FEATURES

01 Customer 360° View
Centralized profiles combining customer data, interaction history, preferences, and insights from all touchpoints

12 Technical Accelerators
To achieve rapid application development and customization

02 Sales Force Automation
Manage leads, opportunities, quotes, and forecasts with AI-driven insights, goal tracking, and pipeline visibility

11 Security & Compliance
Role-based access control, data loss prevention, audit trails, and compliance with global regulations (GDPR, HIPAA, etc.)

03 Customer Service Management
Case mgmt., SLA tracking, knowledge base, omnichannel support (chat, email, social), AI-powered virtual agents

10 Customization & Extensibility
Easily configurable forms, fields, and processes; low-code/no-code development via Power Apps

04 Marketing Automation
Customer segmentation, multichannel campaigns, email marketing, lead nurturing, event mgmt., and lead scoring

09 Mobile Access
Fully responsive mobile app for sales and service teams on the move, with offline capabilities

05 Field Service Management
Work order mgmt., inspection, resource scheduling, mobile technician tools, asset tracking, and IoT-driven service alerts

08 Integration Capabilities
Seamless integration with Microsoft 365, Power Platform, Azure services, third-party apps, and core banking systems

06 AI & Insights
Predictive analytics, AI-driven next-best actions, sentiment analysis, and KPI dashboards with embedded Power BI

07 Workflow Automation
Custom business rules, approvals, and alerts using Power Automate to streamline repetitive tasks

DEPLOYMENT OPTIONS



Cloud-Based
High scalability, performance, and security via Microsoft cloud



On-premises
Hosted on your own servers



Hybrid
Flexibility to retain critical data on-premises while leveraging cloud capabilities



Integration with existing systems
ERP, CTI, Document Management, Core Systems, Data Platforms

BUSINESS VALUE & BENEFITS

Boost in **sales productivity** by **30–33%** through better customer targeting and streamlined workflows



Mobile, AI-powered and **future-ready digital banking experience**



Enhanced **customer retention and satisfaction** via proactive service and real-time engagement



Better insights via dashboards for data-driven decisions

Built with regulatory compliance (CRS, FATCA, AML) in mind



Reduction of manual work and **operational costs**

WHY CHOOSE NETIKS 360BANK?

01

Deep **banking domain expertise** with a proven track record in the region

02

Built on trusted **Microsoft technology** (Dynamics 365, Azure AI)

03

Unique blend of **AI, automation, and omnichannel support**

04

Fast go-to-market with **pre-built modules** and accelerators

05

Strong **support and customization** for bank-specific needs

GET STARTED TODAY

Request a demo to discover how Netiks 360Bank can elevate your business today!