

F/MIS CUSTOMER VISIT MANAGEMENT

Offers asset managers a simple and user-friendly tool to simplify client relations through customer visit reports and follow up of commercial relations.

BEARINGPOINT AND ITS NEW F/MIS SOFTWARE

The originality of F/MIS consists in offering offering standard software for Management Information at a competitive price for private banks, composed of various modules (F/MIS profitability, accounting, interest margin, compliance, customer visit report...).

For an easier integration F/MIS covers the entire cycle of production of decisional information, i.e. extraction of data from the legacy systems, organization in a database, computation of indicators up to the reporting.

With more than 200 banks as clients in Switzerland, Luxembourg, Germany and Italy, BearingPoint also offers reporting software for private banks in the legal (F/RE) and fiscal (F/TAX QI and EU / Easy-tax) area.

FUNCTIONALITIES OF F/MIS CUSTOMER VISIT MANAGEMENT

F/MIS Customer visit management offers a user-friendly way to document and archive information in relation with customer events: visit reports, travel reports, telephone conversations and surveys. Asset managers keep key information for every event type: transferred assets, deadlines, client feedback, comments...

The system gives a vision of the clients administered by an individual asset manager or a group of asset managers.

Extract from the software:

Client: 12345 CARIOCA

Reports

Date	Type	Asset manager	Assets	Comments	
27.01.2004	Visit	Michael Smith	550'000	The client does not want to...	detail
28.01.2004	Telephone	Michael Smith	550'000	Cancelled orders	detail
02.02.2004	Visit	John Rogers	480'000	New proposition...	detail

[New visit report \(bank\)](#)

[New travel report \(movem.\)](#)

[New tel. report.](#)

[New instruction](#)

All events reaching a deadline can be reminded and notified by e-mail.

In a situation where a client is interested in buying a product that can only be subscribed at the end of the month, the asset manager who has registered this information will receive an e-mail for reminder x days before the date of the deadline.

who is the target of F/MIS
Customer visit management

This new module is targeted at users from asset management, front office and the management of the bank.

This module can be interconnected with F/MIS compliance in order to provide a control of the date for periodical client reviews. In this case, the compliance officer or the internal auditor are also potential users.

THE KEY POINTS OF F/MIS CUSTOMER VISIT MANAGEMENT

- Easy parameterization of event types, instruction types, legal documents;
- Easy web-based installation;
- Module is integrated in an MIS that can be used for other purposes;
- Already integrated with several banking packages.

READY TO USE FUNCTIONALITIES

- Management of visit reports;
- Management of instructions;
- Generation of warnings;
- Input of prospects;
- Follow up of pending issues;
- Vision by client group;
- Vision by asset manager.

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