

Client Communication Management

High-quality, custom visual presentations in minutes.

essential for banking

avalog

CCM Presentation add-on module

Generating a large number of presentations meeting compliance and individualization requirements, combined with a fast and user-friendly creation process, is a mammoth task often prone to errors.

The CCM Presentation module is powered by Assentis Technologies and fully integrated with the Avaloq Banking Suite and other Avaloq CCM solutions. It eases the way to produce and manage professional sales and marketing presentations by increasing business agility:

- Empower business users to work independently from IT
- Available both via web browser and as an app for mobile devices (tablets)
- Reduce IT cost
- Customize through automatic data integration
- Ensure up to date and compliance with CI/CD and regulatory requirements

CCM Presentation is a simple-to-use tool facilitating conversations between relationship managers and clients. Every presentation can be prepared with real-time data from various internal and external data systems and individualized content during a live client engagement.

With the separation of content and layout, the admin user can easily create, update and process templates in one place. Layout components can be created or updated once with overall affect.

Using Avaloq CCM Presentation means benefiting from the expertise and cooperation of both Avaloq and Assentis. Assentis is the leading specialist in customer communication for financial service providers.



Carole Benathan
Key Account Manager Assentis

Statement

"Let me show how easily you can ensure timely and fully compliant presentations.

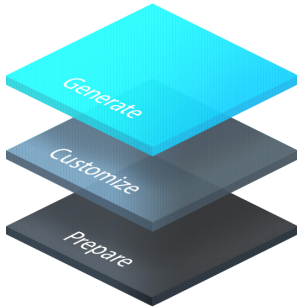
I will take you on a 15-minute journey that will give you valuable and lasting insights".

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Client-facing document in 3 simple steps



1. Prepare

Preparation in manager desk adhering to defined business processes. The process is triggered from the Avaloq Banking Suite, and data is automatically collected and communicated to the presentation.

2. Customize

Presentation view and customization to meet specific needs. The presentation is automatically created with real-time client and market data while adhering regulatory and CI/CD requirements. The user can do amendments within set boundaries.

3. Generate

Finishing and generation of the presentation in the format of choice. The presentation is produced in PowerPoint or PDF, ready to show and print. The tablet version provides the same functionality and can be used for direct presentation to the client.

Avaloq CCM is a fully integrated suite, powered by the latest technology in digital customer communications.

CCM Standard

Create client reports and documents with pre-defined content, such as transaction advices or portfolio statements, in various output formats.

CCM Interactive

Create and edit documents in real time, e.g. during a conversation with a client. Interactive documents are seamlessly integrated into business processes.

CCM Presentation

Generate and share presentations, such as sales and marketing presentations or product presentations with up-to-date content and design.

Twenty banks using the Avaloq Banking Suite have successfully implemented Assentis CCM modules. Avaloq CCM is periodically enriched with new features and functionalities to meet evolving requirements.

Get in touch, and we will show you a real pain relief regarding client communication, and share with you some of our customer stories.



Francisco Peralta
Product Manager Avaloq

Statement

"The need for more flexibility in customer communication has greatly increased. Changes to customer-centric documents have to be completed within no time and in compliance with growing requirements. The Avaloq CCM platform powered by Assentis offers the best solution on the market, seamlessly integrated in your Banking Suite."

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About Avaloq: essential for banking

Avaloq is driving the digital transformation and automation of the financial services industry. Our customers are the leading banks of today and tomorrow. Based on our fully integrated banking software, we create powerful digital experiences provided through a standardised Business Process as a Service (BPaaS) or Software as a Service (SaaS) model to banks and wealth managers.

To further spur innovation, we work with customers, other fintechs, universities and hundreds of third-party developers in a uniquely collaborative way we call the Avaloq Ecosystem. Headquartered in Switzerland, Avaloq has more than 2,000 employees and we have a presence in the world's most demanding financial and innovation centres, including Berlin, Frankfurt, Hong Kong, London, Luxembourg, Madrid, Paris, Singapore and Sydney.

More information is available at www.avaloq.com