

Achieve Goals
Maximize Opportunity

Maximizing opportunities is about more than managing a pipeline ... it's about the timely achievement of organizational goals.

CASH Opportunity provides the tools to do just that as users manage the business development and client retention process supported by reliable workflow guidelines—for every line of business, across the enterprise.

Benefits

CASH Opportunity provides the tools to help achieve organizational business development and client retention goals as users work against flexible, business line-level workflow guidelines.

- Manage business development goals at the business line and business entity levels
- Establish flexible work and process flow frameworks to help users achieve consistent results
- Enhance business development opportunities with consultative tools, dynamic analysis, and professional reports
- Integrate financial, risk and profitability data from other CASH Suite products to better manage opportunities
- Improve staff effectiveness through better collaboration
- Increase productivity with intuitive MS Office-based interfaces to Word, Excel, Outlook and PowerPoint

Features

CASH Opportunity provides an intuitive framework within which to manage both new business development and client retention efforts in the context of organizational goals and objectives.

- Support for comprehensive contact and relationship management
- Process driven workflow management capabilities help users achieve goals
- Pipeline, client and lost business analysis
- Compliance reporting for declined business
- Relational data structures support managing highly dynamic opportunities
- Fully scalable, enterprise capable solution
- Extensive database connection options
- Support for a wide range of deployment options
- Full Microsoft Office automation support