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**CUSTOMER  
RELATIONSHIP  
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SOFTWARE  
EDITION**

**David Acevedo,**  
President and  
National Sales Director

# 360 VIEW

**MEET THE  
BANKER'S CHOICE  
CRM**





COVER  
STORY

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WE'VE GOT  
23 YEARS OF  
EXPERIENCE HERE,  
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KNOW IS A GREAT  
PRODUCT FOR  
THE COMMUNITY  
BANKING MARKET



**T**he scramble to acquire customer data, to understand it, and to apply it with results is an ongoing race within every financial institution. With a long list of CRM providers claiming to have the best tool for this purpose, knowing what you are buying and who you are talking to is the first step to finding that coveted solution.

360 View, the 23-year-old company with a CRM platform developed specifically for banks and credit unions, is one of these providers touting their solution. David Acevedo, President of 360 View, understands the scramble for the best tools in the banking sector—he used to be the guy scrambling. He talks with self-awareness about his own search years ago as a bank sales executive and the interesting role reversal that has happened now that he is bringing a bank-savvy CRM to financial institutions: “I came to 360 View in 2008 having previously been a client. As the Director of Sales for a bank then, I experienced the 360 CRM platform as one that was unique and one that really worked.” He believed so much in the company that he joined them to help grow the market share of a product and service that he thought was truly on point for bankers.

A primary bragging right for 360 View is that the banking experience runs deep, and it runs even deeper for Acevedo with 25 years of banking experience before joining 360 View. His first job as a teenager was

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CHOICE CRM**



as a part-time teller for a nearby community bank. So nearby, in fact, he rode his bike to work, and though it's quite the trek from the bike seat to today, Acevedo sits in his new seat as President of 360 View like it's a seasoned leather chair, comfortable and familiar. A life-long career in and around banking translates to confidence and deep knowledge, not only about the industry, but about particular needs and the right solutions for financial institutions today.

across different business lines, a full pipeline tracking tool that allows tracking of any business that is in a sales funnel, and an issue resolution feature that keeps customer inquiries prioritized and routed to the proper support staff for resolution.

Integration with Outlook, a thorough Reporting feature, and a mobile app are other benefits of their CRM. Acevedo adds detail about the marketing capabilities, "Our marketing tool allows for the mining of information. All of that data comes in from the core, third-party systems, and anything that happens within 360, and that data can be used to create lists and segmentation programs for campaign creation. It allows for full campaign creation and automated onboarding, which puts the power and knowledge in the hands of our clients, so they have fewer missed opportunities and better results."

360 View's proprietary SmartPops feature drives opportunities to the frontline where customer-specific messages



## THE RELATIONSHIP THAT 360 VIEW DEVELOPS WITH A CLIENT IS LESS LIKE A TECHNOLOGY VENDOR AND MORE LIKE A TRUSTED ADVISOR

### Banking Needs Today

For technology companies, knowing the needs of the customers you serve is the beginning of actually meeting those needs. 360 View prides itself on keeping a finger on the pulse of their clients' needs as well as those of the banking industry in general. "The number one pain bankers come to us with is not having a full view of their customers. They have their customer account portfolios in the bank's core system, which is only managing their transactions with customers. What they are missing is a solution to help manage their interactions with customers," explains Acevedo. Managing interactions with the customer is the doorway to growing trust and loyalty in your customer relationships, and it is the central goal of customer relationship management tools. The 360 View Platform is designed specifically to do this for banks and credit unions.

### 360 View CRM

The 360 View CRM Platform includes all the features of a standard CRM with a robust set of built-in marketing tools. Talking specifics, Acevedo says of his clients, "they can track every customer interaction, whether those interactions are marketing-driven, done at the front line, call center, or whatever those touches are, they are all tracked. Anybody can look at a customer record and see who's had some type of touch with that client." 360 CRM also has full referral tracking and reporting

appear and equip a banker to talk with a customer about the right service or product at the right time. In addition to the base CRM, multiple add-on modules, like Profitability, Analytics, and Goals & Incentives are available. Each of these solutions puts information and power into the hands of the end user so they have accurate information that they can make actionable.

### 360 View and the Client Relationship

Neck and neck with the longevity/experience bragging rights is 360 View's focus on and care of the client relationship. They pride themselves on the personal service they deliver to their banking partners. In fact, that is how they think of and treat their clients, as partners they are listening to and committed to for the long haul. Acevedo says they have always done it that way: "From the very beginning we listened to what our clients

had to say in terms of functionality and features. In the early days we had a 'white-board committee' of clients who talked through the next phase of functionality. We've expanded beyond that now with a community forum and people submitting ideas online. Our clients have been, and still are, an integral part of building out the functionality."

When it comes to ongoing client care, the 360 View Client Services team is all about regular check-ins and planned meetings for touching base on system use and satisfaction. Acevedo describes these meetings, "We talk about real things, we talk about how they are using 360, results that they're getting, things they want to see, and we look for opportunities where they may not be using it and how they could be using it better."

The relationship that 360 View develops with a client is less like a technology vendor and more like a trusted advisor. Acevedo again, "We're not salespeople that are going to tell you how we think you should do it. We're going to be consultative partners, and we're going to share experience on how we've actually done it. We feel the strength in our front-end team is to have some level of banking experience because when we are sitting in a room with bankers, we

want to understand your process. Because we've done it, we recognize what the pain is, and we can, in a best practice, offer a solution."

### The 360 View Difference

Several characteristics make 360 View distinct, but perhaps the most important is it is an industry-specific product. With more than two decades in operation, they are likely among the first CRMs developed specifically for banks and credit unions, if not the first. Doing the same thing for that long affords a company the focus to develop something excellent. Acevedo elaborates, "We've got 23 years of experience here, building out a product that we know is a great product for the community banking market—23 years of development and experience, all we've done is further developed our product."

In addition to their industry-specific focus, 360 View integrates with any core banking system. This means a potential client does not have to build around their core or be married to a CRM offered by their core system. And if a client decides to change their core system, 360 View is portable; it carries all the data and integrates with the new core system.

Finally, Acevedo says that 360 View being an enterprise-wide solution with no per-seat licensing fees is a real distinguishing feature. It is their intention to be on every desk in an institution offering access to powerful information to every employee. Considering this, the scalability of 360 View is impressive and affordable. Speaking about these differences with a recent prospect who was engaged with one of the largest generic CRM platforms, Acevedo says he got an immediate and animated response: "Why have I never heard of you? You guys are exactly what we want."

### Looking Forward

Looking to the future, 360 View sticks to what they do best: knowing the banking industry and their clients, then responding with tech-savvy improvements that make banking better for bankers and their

customers. "Our goal is to continue to be on top of what is out there, so we are tapped into what the industry is saying—like what it means to do more with AI—and we also really listen to what our clients are saying. So, continuing to enhance our current solution—like our upcoming redesign of our front-end SmartPops tool—is always part of the roadmap," says Acevedo.



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Without a doubt, 360 View has a very robust tool that is also user-friendly. It's an out-of-the-box solution for banking that can be tailored to fit the institution's unique workflows and processes. In a field littered with CRMs that are not specifically designed for financial institutions, 360 View seems to understand financial services in a way that makes a qualitative difference in their product and the user experience. Acevedo speaks confidently and comfortably from his new position, "When you're partnering with us, and you're talking to us in the sales process and evaluating different partnerships, we continually prove our experience. You're not talking to people who have not been in positions to either deploy or use a solution. We are bankers who have actually done it. We've been around for a long time and we're doing it better than anyone else in the industry." **BC**



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