

Fenergo Client Lifecycle Management

Transforming customer journeys for better customer experience



Industry Challenge

Disruption, innovation, and data analytics are reshaping the banking industry. As banks seek growth opportunities, they must also balance heightened customer expectations, a rapidly evolving competitive landscape and an increasing regulatory burden. Improving the digital capabilities and client experience while maintaining compliance will be critical for banks to remain competitive and relevant.

Deliver Better Digital Client Experiences with Fenergo's CLM Platform

Fenergo's Client Lifecycle Management (CLM) platform is an industry leading solution that enables financial institutions to thrive in this environment of increasing demands. The solution provides fully automated end-to-end client journey orchestration, from initial onboarding to ongoing lifecycle events, enabling banks to bolster digital capabilities, accelerate time to revenue and reduce the cost of compliance.

Powered by our advanced API integrations and intelligent regulatory rule engine, Fenergo CLM facilitates efficient customer/investor onboarding by reducing manual tasks, eliminating labour-intensive processes and providing visibility across the onboarding process for all stakeholders.

Our flexible and configurable solution can be deployed on-premise or in the cloud (SaaS) and is a fit for organizations of all sizes. Our purpose-built and open architecture allows banks to seamlessly integrate with existing systems, streamline transformation projects, and drive desired business outcomes.

Elements of Client Lifecycle Management



- ✓ Initial Prospecting
- ✓ Entity Onboarding
- ✓ Product Origination
- ✓ Offboarding
- ✓ Data Analytics
- ✓ Entity Maintenance

fenergo:

Trusted by over 100+ Global Financial Institutions seeking to digitally transform their client journeys & achieve operational efficiencies in compliance with regulatory obligations

Benefits of Fenergo's CLM Solution

Fenergo CLM transforms how financial institutions manage clients throughout the client lifecycle.

Enhanced visibility, coupled with advanced workflow, and data management capabilities empower Fenergo clients to achieve front to back office transformation.



Accelerate
Time to
Revenue



Enhance
Client
experience



Streamline
Client & Product
Onboarding



Reduce
Cost of
Compliance



Operational
Efficiency



Improve
Data Accuracy
& Analytics

Key Features

- ✓ **Omni-channel Onboarding & Origination**
- ✓ **360 Degree Client View with Data Master**
- ✓ **Digital Self-Service Channels**
- ✓ **Enterprise-Wide Compliance with KYC/AML Rules Engine**
- ✓ **Intelligent Document Processing**
- ✓ **Open and Flexible Architecture**
- ✓ **Available On-Premise or Cloud**
- ✓ **Seamless Integration into Data Repositories and Front Office Systems (Salesforce/CRM)**



"Implementing Fenergo's solutions helps us improve our service further by streamlining the client lifecycle journey, significantly reduce onboarding times, ensure compliance, and expedite client due diligence. It helps free up resources to focus on the high-touch client service that differentiates Mizuho Americas."

Greg Eickbush,
Head of Capital Markets Operations, Mizuho Americas

About Fenergo

Fenergo is a leading provider of Client Lifecycle Management, AML/KYC Compliance and Client Data Management solutions. With 100% focus on financial services, Fenergo delivers technologies that can transform how financial institutions manage and serve their customers throughout the customer lifecycle. We serve 100+ of the world's top financial institutions and have dedicated expertise within each banking vertical. We have global reach with offices in the North America, Europe, Africa, Middle East, and APAC regions.

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