

Financial Services

Financial Institutions face a number of challenges when managing customer relationships, from compliance and regulatory requirements, to accessing information from multiple data sources and applications, to supporting complex business rules and processes.

CoreMatrix helps financial institutions get the most out of their On-Demand CRM solution by customizing the system to help them manage client information, activity history, and sensitive financial data in order to increase productivity and providing the highest levels of customer service.



We are actively involved in the whole CRM adoption process, from design and implementation to managing the adoption process and providing on-going maintenance and support, so we not only help you get the system in place, but also use proven techniques to make sure the system is adopted and used effectively.

Financial Services:

- PHH
- ADP Retirement Services
- American Express
- Merrill Lynch
- Cendant
- CIT
- Pinnacle Financial Corporation
- Allianz Income Management Services
- First Advantage Corporation
- Citigroup – Student Loan Corporation

About CoreMatrix

CoreMatrix is a leading provider of consulting services related to the planning, design, implementation, adoption and support of On-Demand Software Solutions for mid-sized to Fortune 500 companies. CoreMatrix is dedicated to helping customers extract more value from their CRM applications enabling them to quickly improve productivity and see a faster return on their investment.

CoreMatrix has provided CRM consulting services for over 500 mid-sized to Fortune 500 companies in a wide range of industries. We have an in-depth understanding of CRM best practices for the health care industry and can help you customize a solution that addresses your company's unique business needs.

If you would like to find out more about our Financial Services solutions, email info@corematrix.com. We will have a representative contact you.

Experience to help you succeed

- Over 500 CRM projects
- Top consulting partner for salesforce.com
- Experience with complex data migrations and integration with 3rd party applications
- Industry expertise and best practices
- Global implementations and roll-outs
- Experts in user adoption techniques