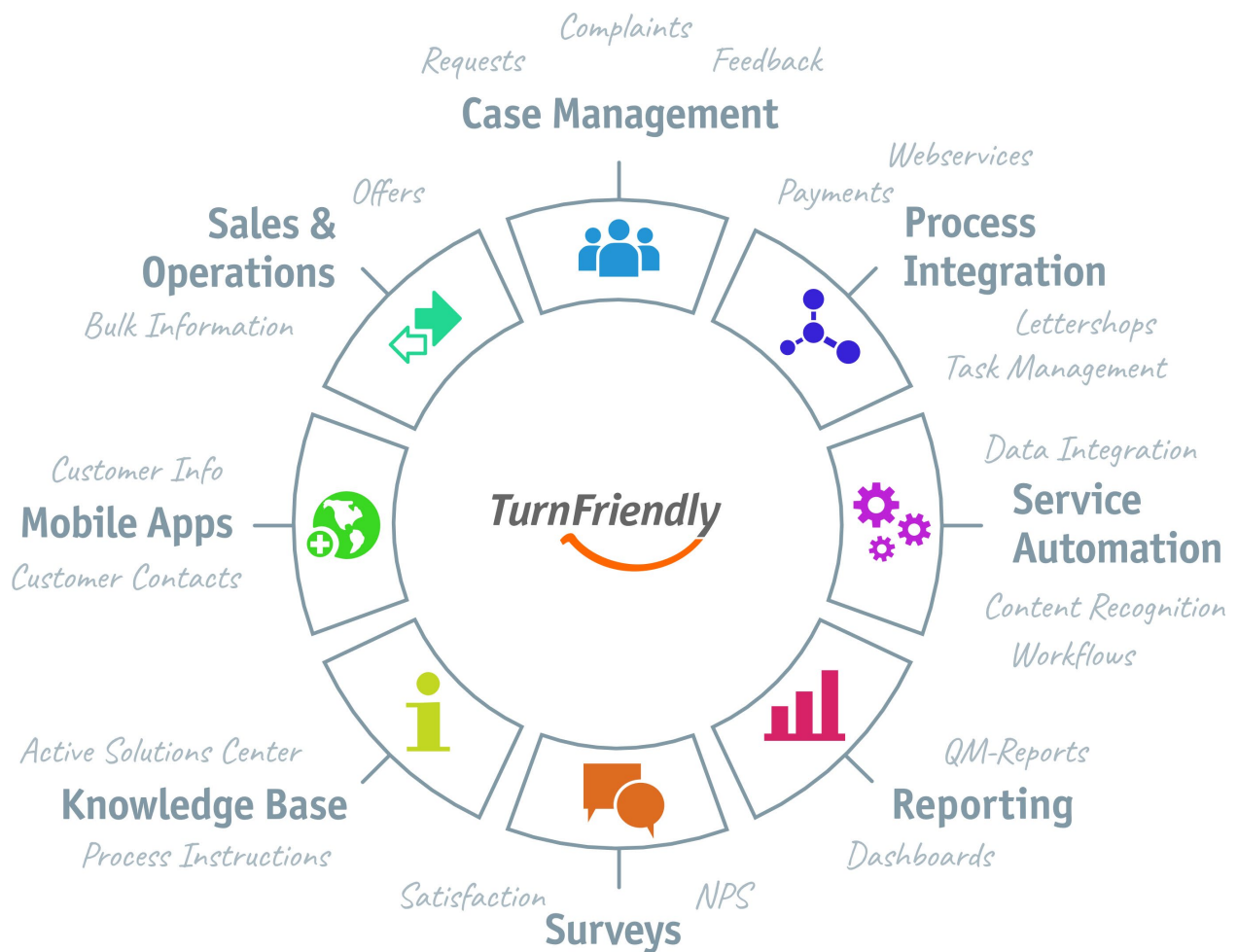# TurnFriendly Financials
Factsheet

Customer Experience Management Software for Banks & Insurances

TurnFriendly Financials is the perfect solution for banks, insurance companies and other financial service providers. Manage concerns such as enquiries, complaints and claims with a CEM software that easily integrates with your systems.

- Automatic process distribution
- AnsFuG module
- Integration into the core systems
- BaFin-compliant reports

Benefit from group-wide deployment opportunities

Concerns, such as complaints from customers or supervisory authorities, can be accepted decentrally as well as centrally and processed group-wide through intelligent process distribution (skills-based routing). TurnFriendly uses the existing branch structures, account and customer number logics and thinks like a core banking system. The data exchange to banking systems creates integrated service processes.

- Audit proof
- Compliance conform
- Strong in reporting
- AnsFuG module
- SEPA

Efficient customer service processes are guaranteed

Banking model

- Efficient input management
- Meets regulatory requirements
- DSGVO / Security / Audit

Complaint management

- Meets regulatory requirements
- Fast processing with compliance to standards
- Complete documentation of all concerns

Working in one system

- Everyone knows their way around
- Complete documentation
- You will be much faster

Specific workflows

- Opinions
- Release processes for refunds and reply letters
- To-do lists, reminders, Traffic light function and reports

Employee and Complaints Register (AnsFuG)

Banks are subject to the obligation to compile statistics and reports for the supervisory authorities. For example, since the end of 2012, the Federal Financial Supervisory Authority (BaFin) requires that investment advisors as well as advice-related complaints must be reported according to § 34d WpHG. TurnFriendly has implemented this reporting process with special AnsFuG components and automatically generates reporting data for employees and complaints.

- Identifying relevant concerns
- All message types
- Employee reports
- Link to HR systems

Integration in banking systems

A seamless integration into existing banking systems: comfortable and efficient. TurnFriendly has, among others, standard interfaces to SAP and adaptors to connect proprietary interfaces in an uncomplicated way. Several customer master data systems can be connected in parallel at the same time. This functionality supports migrations and solves the integration problems of heterogeneous ERP systems.

- Simultaneous connection of several banking systems
- Web services for receiving requests and documents
- Call centre integration
- Mail server integration

Service portals for distribution

TurnFriendly offers company-specific service portals for the acceptance and information of any customer concerns. The data entered in the portal are stored directly in TurnFriendly. Our portals are characterised by an intuitive handling. Customer advisers can give competent information about the processing status

- request line
- Information for the bank advisor
- Intuitive operation
- Single Sign-on

Complaint handling in insurance companies

Insurance companies are subject to the obligation to introduce complaint management and to compile information in the form of statistics for the supervisory authority and send it to them. TurnFriendly covers the requirements of BaFin and thus supports all necessary processes. Reports according to § 34d WpHG (employee and complaint register) can be transferred automatically to the Federal Financial Supervisory Authority (BaFin), for example.

- Complaint registration
- Complaint categorisation
- Complaint evaluation
- Complaint reporting