

# New Era of Sales in **SME Banking**

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logate



**99%** of  
businesses in  
the EU are SMEs

They employ  
more than 100  
Million people

logate





memes.xlsx  
@ExcelHumor



just because you can do it in excel doesn't mean you should

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**6 in 10** banks believe  
Superior Customer  
Experience will be a  
key differentiator in  
corporate banking by  
2026

**Only 26%** think they  
succeeded in digital  
transformation initiatives  
(mainly lending and cash  
management)

Source: Corporate Banking Innovation survey report by  
Strategic Treasurer, Infosys Finacle, and Red Hat

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# Sales Outlook

- ✓ Increasing number of lead generation sources
- ✓ GenZ Entrepreneurs
- ✓ Partnership Ecosystems

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memes.xlsx  
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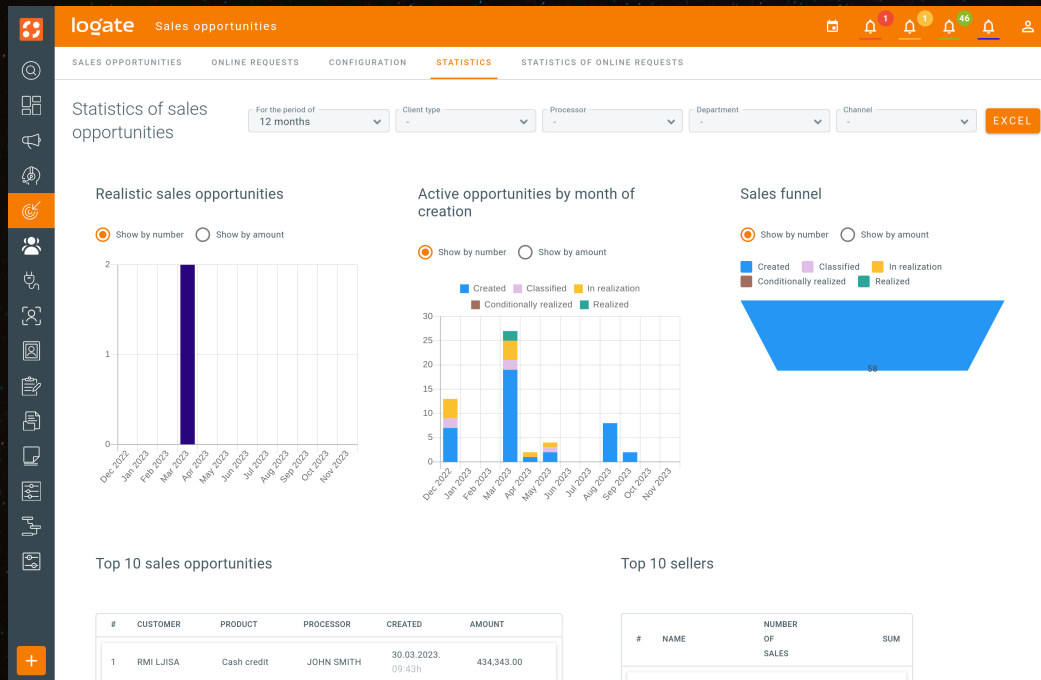


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# CX360 Sales modules



- Modular solution
- 360 View of Customers
- Sales Opportunities for managing sales for existing and non-customers
- My Clients for managing relationships with SMEs
- Detailed reports

# Campaign manager

The screenshot displays the 'logate' Campaign Manager interface. The top navigation bar includes the 'logate' logo, a home icon, a back arrow, and several notification icons. The main content area is divided into three sections:

- Campaign details:** Shows 'Logate Test 1' (Sales campaign) with a status of 'Active'. It lists 'Retail' as the customer type, '10.11.2023' as the start time, and '30.11.2023' as the end time limit. The channel is 'SMS and Viber' and the product is 'VIP cash credit'. An 'EDIT' button is visible.
- Campaign results:** Features two donut charts. The top chart shows a summary of 20 'Created' items, with 0 'In realization', 0 'Realized', and 0 'Rejected'. The bottom chart shows a summary of 20 'Delivered' items and 20 'Undelivered' items.
- Clients:** A table listing 20 clients, all with 'VIP cash credit' as the product name and 'Undelivered' status. Each row includes a 'DELETE' button. An 'EXPORT EXCEL' button is located at the top right of the table.

| FIRST AND LAST NAME | PRODUCT NAME    | PACKAGE NAME | STATUS      | PHASE   |        |
|---------------------|-----------------|--------------|-------------|---------|--------|
| NAJO VIČBO          | VIP cash credit | -            | Undelivered | Created | DELETE |
| DNE VIČDU           | VIP cash credit | -            | Undelivered | Created | DELETE |
| KNO SAMU            | VIP cash credit | -            | Undelivered | Created | DELETE |
| LU VODGA            | VIP cash credit | -            | Undelivered | Created | DELETE |
| NIR TOVMU           | VIP cash credit | -            | Undelivered | Created | DELETE |
| ŠMI ČEVPA           | VIP cash credit | -            | Undelivered | Created | DELETE |
| ANST ARFU           | VIP cash credit | -            | Undelivered | Created | DELETE |
| CAMI ČKA            | VIP cash credit | -            | Undelivered | Created | DELETE |
| LANI NJIRA          | VIP cash credit | -            | Undelivered | Created | DELETE |
| ABA ŠAR             | VIP cash credit | -            | Undelivered | Created | DELETE |
| NDU TIČSU           | VIP cash credit | -            | Undelivered | Created | DELETE |
| SANAL NBO           | VIP cash credit | -            | Undelivered | Created | DELETE |
| PFI ANOSC           | VIP cash credit | -            | Undelivered | Created | DELETE |
| SAAL OKAKR          | VIP cash credit | -            | Undelivered | Created | DELETE |
| IV VIČVU            | VIP cash credit | -            | Undelivered | Created | DELETE |
| OMA ANOŠĆ           | VIP cash credit | -            | Undelivered | Created | DELETE |
| LANI ŠTA            | VIP cash credit | -            | Undelivered | Created | DELETE |
| AST JEVĐO           | VIP cash credit | -            | Undelivered | Created | DELETE |



# CX360 & Connect

logate Client 360

JOHN SMITH  
000000P18547

Billing status: SUPP  
Customer type: Retail  
Customer segment: Retail  
Customer exposure: 0.00 EUR  
Customer days of delay: 0  
Customer due debt: 0.00

Commerciatist: Zaposleni 188

LIQUIDATED PARTIES

ACCOUNTS

Devizni racun - nerezidenti  
Product code: 0030600053287-978

| Field            | Value                                      | Field              | Value                                      |
|------------------|--|--------------------|--|
| Due debt         | 0.00 EUR                                   | Days of delay      | 0  |
| Balance          | 1.06 EUR                                   | Approved amount    | 0.00 EUR                                   |
| Department       | Filijala 10                                | Annuity            | 0.00 EUR                                   |
| Annuity interest | 0.00 EUR                                   | Annuity instalment | 0.00 EUR                                   |
| Product status   | Blokirane ili promijenjene Aktivne partije | Status details     | Blokirane ili promijenjene Aktivne partije |
| Date of approval | 01.11.2007.                                | Exposure           | 0.00 EUR                                   |
| Approved limit   | 0.00 EUR                                   |                    |  |

DETAILS

| Field  | Value    | Field   | Value    |
|--|----------|---|----------|
| Available amount                                 | 1.06 EUR | Reserved amount                                   | 0.00 EUR |
| Min. payment                                     | 0.00     | Total amount overdue 0 - 30 days                  | 0.00 EUR |
| Total amount overdue 61 - 90 days                | 0.00 EUR | Posljednje zaduženje(Datum)                       | 0.00     |
| Posljednje uplate(Datum)                         | 0.00     | IRI%  | 0.01     |
| Annuity number                                   | 0        | Total amount in overdue 91 - 150 days             | 0.00 EUR |
| Number of days in arrears per 0 principal        | 0        | Amount of debt                                    | 0.00     |
| Naknada(%)                                       | 0.00 EUR | Max dani blokade(u 6M)                            | 0        |
| Ročnost  | 0 D      | Iskorišćeni iznos                                 | 0.00 EUR |
| Average of due obligations in the last 3 months. | 0.00 EUR | Number of days of delay based on regular interest | 0        |
| Unused amount                                    | 1.06 EUR | Outstanding amount                                | 1.06 EUR |
| Total amount overdue 31 - 60 days                | 0.00 EUR | Total amount in overdue 271 - 365 days            | 0.00 EUR |
| Average payments in the last 3 months            | 0.00 EUR | The number of days of delay on default interest   | 0        |

Addresses

| ADDRESS        | CITY AND STATE | STATUS |
|----------------|----------------|--------|
| Address 1      |                |        |
| OSOAP          |                |        |
| Backup address |                |        |

Connect Contact Center Interactions

INTERACTIONS IN PROGRESS (8)

- John Smith 01:22
- Savica Tomović 00:56
- Boris Bjelica 02:44
- Petar Vujović 01:14
- Mirka Marković 00:04

John Smith

Can you please help me find out the balance on both of my bank accounts?  
12. 12. 2020 u 14:35

Please use valid ID and point it at your camera so I can scan it and confirm your identity.  
12. 12. 2020 u 14:35

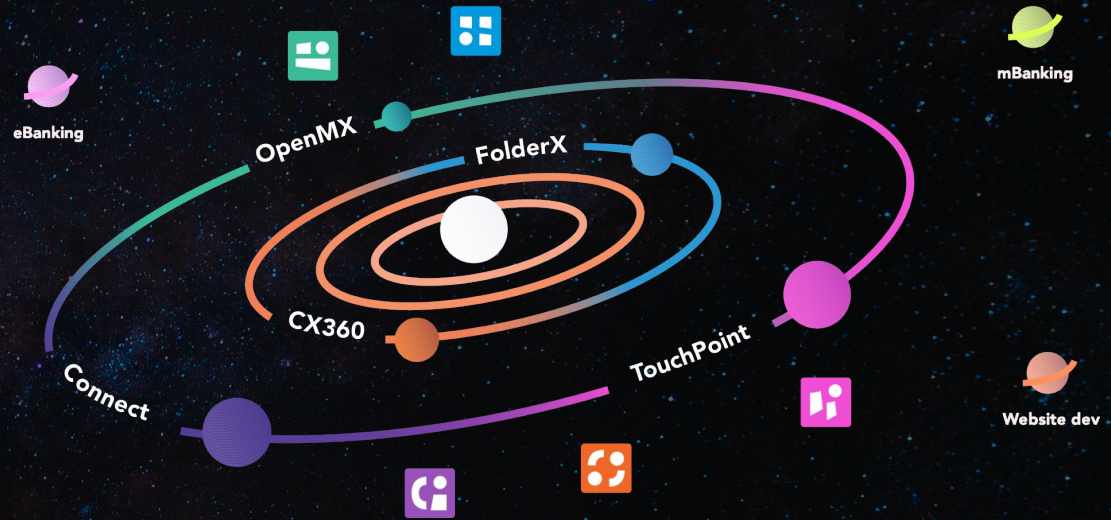
Document.pdf 1.4MB

Type your message here...

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# Digital Banking Universe



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## About Logate

17+

Years on the market

80+

IT professional

200+

Successful projects

20+

Million accounts managed via Logate software

## Clients we work with

Magenta<sup>®</sup>

HIPOTEKARNA  
BANKA  
*Vama posvećena*

Crnogorski  
Telekom

ERSTE  
Bank

Skupština Crne Gore

NLB

Hrvatski  
Telekom

Naša  
AIKO Banka  
*domaća i jaka*

LOVČEN BANKA<sup>AD</sup>

ckbbanka  
*otp group*

Addiko Bank

logate



**Thank you.**

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