



rulecube

ACTIVE CLIENT MANAGEMENT

uniting data, rules and processes

1



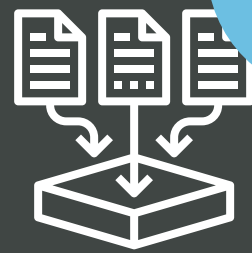
Bring data together

Consolidate the data you have. API tooling can assist here without disrupting your processes.

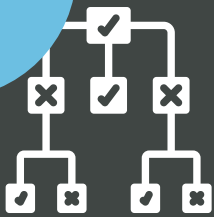
2

Enrich the data

Trigger clients to update their data, connect source data, and use calculations to update and enrich data.



3



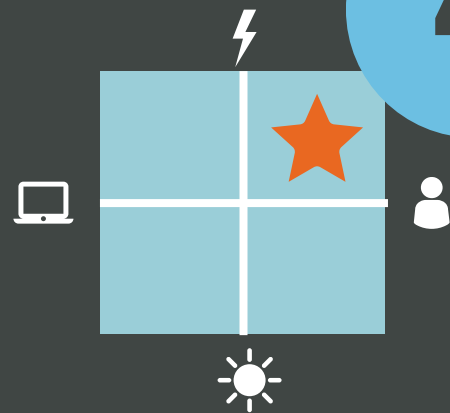
Apply advisory framework ruling

Use a flexible business rule engine to find the need for client management.

4

Prioritize

Organize client management needs in urgent and less urgent, sensitive to advice or not.



5



Connect process flows

Follow up the four categories with active automated processes, client portal nudges, personal outreach and collective outreach.

6

Optimize as you go

Make sure your tools for defining your advice framework and defining your processes are agile. So you can adjust to legislation changes and to lessons learned in the blink of an eye.

