

CASH Opportunity™



Increase new business development and client retention with a CRM solution that manages the commercial lending pipeline.

Managing a sales pipeline using Excel® spreadsheets or other standalone tools can be difficult at best. To better recognize and nurture your most profitable commercial lending opportunities, you need a real-time, enterprise-wide view of potential business from both prospects and existing customers.



Dynamic CRM solution

Designed specifically to support sales and service activities for commercial lenders



Support business development and retention

Helps achieve goals for new business growth and client retention



End-to-end activity management

Facilitates the planning, tracking, reporting, and management of all sales and service interactions



Customer relationship management for commercial lending

CASH Opportunity™ is part of CASH Suite™, a powerful commercial lending software solution that helps business lenders increase profits and grow top-line revenue by achieving straight-through processing across every step of the commercial loan lifecycle. CASH Suite drives increased efficiencies and greater accuracy while reducing operational risk and enhancing profitability.



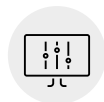
View pipeline performance and track new business under development



Set business goals and establish streamlined workflow processes



Forecast pipeline opportunities by account representative, business line/unit, and time to close



Assess key performance indicators to understand the probability of closure and tie results to goals



Analyze customer history across touch points and identify up-sell and cross-sell opportunities



Facilitate communication between departments



Evaluate past performance history to help predict demand and allocate resources



CASH Opportunity provides a CRM solution to manage sales and service activities throughout the commercial loan process. With CASH Opportunity, you can increase the effectiveness of sales and retention efforts and maximize new business from existing relationships.



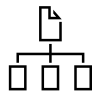
Easy-to-use lead and referral tracking efficiently helps sales opportunities move through the pipeline.



Private and shared calendar integrates with Microsoft Outlook® to consolidate tasks, meetings, targeted close dates, applications, goals, and more.



Dynamic CASH Directory view of clients, prospects, and referral sources provides a comprehensive snapshot of the entire customer relationship.



Integration with CASH Reward™ and CASH Profit™ enables updates to risk profiles and pricing details to ensure loans are profitably priced.



Pipeline management capabilities help assess what steps need to be taken to close prospects and clearly shows the progression of opportunities.



Flexible reporting options track referral sources and allow benchmarking against current plan, prior year performance, team results, or other custom criteria.



For more information on how CASH Suite and CASH Opportunity can help you strengthen your business lending portfolio and accelerate your success, call **800-397-2341** or visit wolterskluwer.com/CASH →

About Wolters Kluwer Financial & Corporate Compliance

Wolters Kluwer (EURONEXT: WKL) is a global leader in information solutions, software and services for professionals in healthcare; tax and accounting; financial and corporate compliance; legal and regulatory; corporate performance and ESG. We help our customers make critical decisions every day by providing expert solutions that combine deep domain knowledge with technology and services.

Wolters Kluwer reported 2024 annual revenues of €5.9 billion. The group serves customers in over 180 countries, maintains operations in over 40 countries, and employs approximately 21,600 people worldwide. The company is headquartered in Alphen aan den Rijn, the Netherlands.

Wolters Kluwer shares are listed on Euronext Amsterdam (WKL) and are included in the AEX, Euro Stoxx 50, and Euronext 100 indices. Wolters Kluwer has a sponsored Level 1 American Depositary Receipt (ADR) program. The ADRs are traded on the over-the-counter market in the US (WTKWY).

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