

Connected Teller™ for Signature®
Enhance Your In-Branch Customer Interactions



In today's evolving financial services market, managing customer relationships and offering relevant products across multiple channels are more important than ever. Connected Teller for Signature from Fiserv helps support these goals right from the teller line.

Connected Teller is a smart-client companion to Aperio™ for Signature, our cross-channel customer experience platform. It empowers tellers to become extensions of your sales team and fosters a sales culture throughout your organization.

Sales-Oriented Tellers

While teller operations are still necessary in the ever-changing multichannel banking environment, they typically don't generate profit. And yet the branch is still the primary place for your staff to have face-to-face interaction with customers. Where better to initiate a sales dialogue? The branch can become a true sales outlet when tellers are equipped with the right tools and training to take on a more sales-oriented role. Connected Teller provides tellers with customer-centric sales tools that help them improve service and take an active role in boosting revenue.

Focusing on the Customer

As part of the overall Aperio approach, Connected Teller encourages your frontline staff to shift from a transactions-only mindset to one that is focused on the customer. The solution arms your tellers with customer-specific knowledge that helps them ask questions targeted to customers' specific needs so customers feel welcome. This new frontline focus can help your financial institution:

- Win customers' business
- Improve bank brand image
- Maintain customer loyalty
- Influence word-of-mouth recommendations
- Increase overall customer satisfaction

The Right Tools

Connected Teller is powered by a business process engine that drives sales-related information to the teller, providing your team with the tools needed to become more responsive to customer needs and to promote sales. The tool offers:

- Customer awareness – provides customer data as a supplement to transaction data, enabling the teller to know the customer better
- Campaign solicitation – prompts the teller to deliver relevant and actionable sales and service campaigns



Fiserv is driving innovation in Payments, Processing Services, Risk & Compliance, Customer & Channel Management and Insights & Optimization, and leading the transformation of financial services technology to help our clients change the way financial services are delivered. Visit www.fiserv.com for a look at what's next now.

- Referral generation – enables tellers to spot sales opportunities, initiate conversations and create leads
- Engagement history – shows tellers a list of all engagements that have occurred between a customer and your financial institution across all channels
- Significant events – displays records of events your financial institution deems to be defining moments in a customer relationship

Connected Teller enables your team to optimize every customer interaction, resulting in a higher level of service and satisfaction.

What Customers Want

Industry research confirms the value of a customer-driven teller team. When choosing a retail bank, customers want to know the focus is on how the bank can serve their individual needs, rather than on how the bank can win their business. According to The Evolving Branch Banking Strategy study conducted by Mercator Advisory Group in 2014, “Even though many of today’s banking customers are embracing self-service and digital channels, over a quarter of Mercator Advisory Group CustomerMonitor respondents prefer to conduct business with tellers at a branch. Furthermore, 49 percent of respondents prefer some form of face-to-face interaction, and another 20 percent cited a preference for speaking with a customer service or personal financial advisor, banker or broker.”

Key Benefits

- Optimized customer interactions
- Enhanced teller understanding of the customer relationship
- Stronger decision-making
- Tellers empowered to initiate referrals for new sales opportunities
- Automatic enforcement of business rules
- Automated workflows for operational efficiency
- Improved service and customer experience

Value-Added Integration

- Teller Source Capture™ – teller remote capture
- Aperio
- Nautilus® – document imaging
- Financial Crime Risk Management Platform
- ARP/SMS™ – positive pay system
- Integrated Currency Manager™ – cash and logistics
- Onboard Advisor – regulatory reporting
- Relationship pricing

Connect With Us

For more information about Connected Teller for Signature, call 800-872-7882 or visit www.signature.fiserv.com.



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