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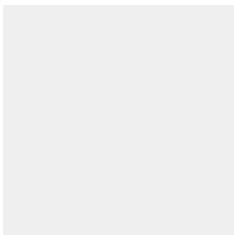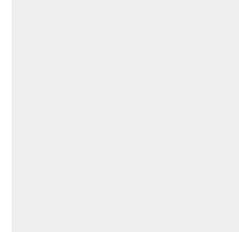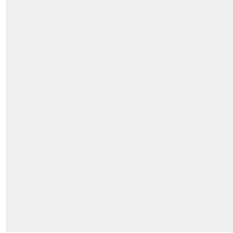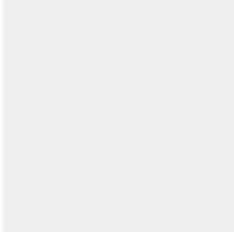## CRM and Business Intelligence for DNA®

Leverage Your Financial Institution's Rich, Robust Data to Analyze
Performance and Build Stronger Accountholder Relationships
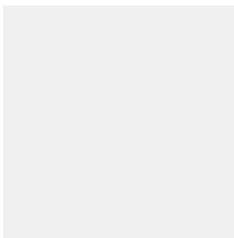
Products

Knowledge is power. A knowledgeable staff armed with the right information can build stronger relationships with your customers or members and improve your organization's performance. CRM and Business Intelligence for DNA from Fiserv enables you to leverage information to your advantage, helping you analyze performance, gain valuable insights into accountholder behavior and enhance relationships.

CRM and Business Intelligence for DNA includes Open Data, Publisher, Marketing Analytics, Contact Management, Dynamic Messaging, Activity Manager and Report Writer.

The ability to transform raw data into actionable business intelligence is a key differentiator in profitable organizations. CRM and Business Intelligence for DNA helps you to gain that intelligence. You can use the robust solutions in this suite to deliver useful intelligence to all of your customer or member touchpoints; to prepare and analyze reports to track, measure and evaluate marketing programs for cost-efficiency and effectiveness; to improve the service experience for your accountholders; and to make the most informed business decisions.

Open Data for DNA

Transform the abundance of data your organization collects into useful information with Open Data. This centralized repository draws data on accountholders, transactions, profitability, products and channels from multiple sources to provide your staff with the intelligence needed to make effective decisions.

As a robust data warehouse, Open Data can handle massive amounts of information and provide structure and access to data from numerous systems and platforms to facilitate research, analysis and reporting. Multiple data views are available to consolidate relational DNA account processing data, making it easy to find what you need.

- Understand household relationships, trend historical data, measure profitability, and create and track targeted campaigns

- View customer or member information summarized at the account, individual, household, product or branch levels

- Obtain a complete view of each relationship, based on data that is clean, extensive and up-to-date

- Gain the real-time analytics of account processing data along with the trending abilities of a historical data store, using the same Oracle® database as the DNA account processing system

Open Data also supports the optional BI Query application from OpenText™, an ad hoc enterprise-wide query tool that offers a visual experience of your data and allows you to create graphically appealing reports. BI Query easily connects to Open Data along with any open, database-compliant system, making it easy for you to access data from relational databases on different operating systems.

Attract, Retain and Grow Relationships

Your organization's success depends on your ability to attract, retain and grow accountholder relationships. CRM and Business Intelligence delivers customer relationship management (CRM) tools that empower you to do just that. From improving cross-selling and increasing referrals at the point of sale, to tracking inquiries, routing leads and measuring marketing program effectiveness, the CRM modules in the suite can help you improve top-line revenue and enhance the service experience for customers or members.

Marketing Analytics for DNA

Gain critical knowledge about your customers or members, prospects, business lines and products with Marketing Analytics, a single source of customer/ member and account information that helps you broaden your understanding of relationships through a complete picture.

The browser-based, point-of-service features of Marketing Analytics enable you to share valuable intelligence about people, accounts and households directly with your front line or other staff for use in support, analytics, reporting and marketing. Marketing Analytics helps you to conduct campaign targeting, perform product profitability assessments, analyze the depth of each relationship and identify cross-sell opportunities. You gain insights to help you measure ROI for each marketing campaign, so you can determine pricing, campaign incentives, and a break-even response rate, while focusing resources more effectively in the future.

- Use customer value indexing to determine the past, current and future value of relationships

- Assign expenses, fees and margins for each product type

- Compute a profit contribution value for each account, person and household

- Integrate with ProfitVision from Fiserv, a full-featured system that takes profitability analysis beyond the finance department

- Integrate the module with Report Writer for DNA, an enterprise-wide query and reporting solution that simplifies and automates report creation and distribution

Contact Management for DNA

Place relationship knowledge, actionable activities and transactional information at your staff's fingertips with Contact Management, a solution designed to help you maximize every interaction and deliver superior service. Contact Management provides easy access to information from multiple CRM and transactional systems to provide a complete history of interactions with a customer or member, including the channel, length of contact, transactions conducted and staff involved.

- Manage and track multiple interactions using contact session-management capabilities

- Optimize every contact using real-time information spanning the entire relationship

- Increase wallet share by helping your staff suggest timely offers for relevant products and services

- Improve efficiency using workflow-enabled functionality

- Protect personal information and reduce fraud risk through the robust authentication and validation features

Dynamic Messaging for DNA

Empower your staff to create new opportunities for growing relationships while enhancing service with Dynamic Messaging. This solution automatically displays real-time, customer- or member-specific messages on screen when an accountholder's record is accessed. You'll boost response rates by providing timely, relevant offers at the point of interaction, when customers or members are most receptive.

- Improve revenue and sales through better front-line selling and an active sales process enterprise-wide

- Distribute marketing campaigns and customer/member preferences to multiple touchpoints

- Deliver a consistent message across every staff member and channel

- Capture lead referrals for products in which your customers or members express interest

- Forward responses to the proper employees for fast service fulfillment

Activity Manager for DNA

Managing sales leads, service requests and marketing programs is critical to building relationships, and Activity Manager helps you do that. This business process management solution tracks sales and service opportunities and routes them to the right employee, maximizing your return on leads and referrals while improving service.

Activity Manager uses customizable, automated workflows to manage and streamline your sales and service processes. Use it to track, manage and report on activities and to provide marketing, operations, service and sales staff with the activity data they need to better manage employee assignments.

- Monitor sales activities and report outcomes, comparing employee or branch-level performance

- Ensure you meet or exceed sales goals by giving branch managers greater control of employee assignments

- Improve accountability by tracking referral activity

- Improve accountholder satisfaction by gaining a full view of activities to ensure every interaction continues the conversation and service experience

Publisher for DNA

Extend your strategic vision from the boardroom to the front line with Publisher, a customizable portal page providing access to all solutions in the CRM and Business Intelligence suite along with intranet communications, online documents and internet links. Publisher gives your staff a personalized, single point of access for viewing customer/member and account information that enhances front-line support, marketing and reporting.

Publisher allows you to deliver report data, charts and graphs to knowledge portals that can be personalized to each employee's role and preferences, helping your staff plan marketing initiatives effectively. Publisher enables customized, browser-based access to published resources such as internal documents, spreadsheets, reports, marketing brochures/flyers and staff communications, rate sheets and other product data and URLs for sites that are frequently used within the organization. A comprehensive dashboard displays summaries such as sales totals, branch performance and service levels, each reported in a variety of formats tailored to an employee's requirements.

- Customize data views for individuals or groups with similar needs

- Empower staff members to customize their own Publisher pages

- Quickly populate portals with data from other sources

- Use the report scheduler function to deliver up-to-date information

- Save time and money by eliminating paper reports

Report Writer for DNA

This powerful, flexible report generator meets a wide range of needs – from simple lists to complex summary reports. Because it is integrated with the DNA account processing platform and compatible with application databases such as Oracle, IBM DB2® and Microsoft SQL Server™, Report Writer can report on data from multiple databases on multiple platforms. The solution simplifies report distribution by enabling you to print or save reports as PDFs or e-mail them to individuals or groups.

- Customize report design and layout, or choose from preprogrammed report templates

- Simplify ad hoc reporting using a web-based, intuitive query and report writing tool that improves efficiency

- Aggregate data in a single view from multiple sources, such as account processing, investment, lending, general ledger, marketing and insurance systems

- Integrate with Publisher to schedule daily, weekly or monthly report runs

- Customize data views easily by collapsing and renaming tables and data elements with user-friendly names

- Choose from many output options, including electronic files such as comma-separated or PDF files, spreadsheets, or Microsoft® MapPoint

Connect With Us

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