



ICBS EVENT MANAGEMENT

Sales and customer servicing tool

The ICBS Event Management module improves and standardises the way in which you service and cross-sell to your customers. Event Management is a first line, CRM solution which automatically searches for sales opportunities by identifying and responding appropriately to pre-defined lifecycle events. Using ICBS Event Management you can automatically send a welcome letter to a new customer, provide details of insurance to a new mortgage applicant, or offer a different loan product in response to a redemption quotation. Your organisation can easily configure filters for each event, ensuring that the appropriate action is taken against each and that the system delivers the right outcome. Because Event Management also updates a contact log in addition to its prescribed action, your agents will have immediate access to a customer's full history of events, further improving the service experience.

Events that Mean Business

Designed to automate the capture and delivery of sales and servicing opportunities, ICBS Event Management helps to make cross-sales a reality and excellent customer service commonplace within your organisation. These sales or servicing events, which occur within the retail-banking environment and specifically against loans, insurance, deposits and customers, can be defined such that a single event can generate multiple actions that include:

- Correspondence that can be delivered via post, fax, and/or e-mail (with ICBS Customer Correspondence)
- Workflow process
- Memos and tickler files.

Make sure that someone who is past due on their mortgage loan isn't pre-approved for a personal loan.

Condition filters are easily defined so that the event outcome is generated at the right time and on the right frequency.

Know Where Each Action Is

ICBS Event Management logs each action deployed for an event, providing a real-time view of all actions generated within the system. With this information, a call centre agent can immediately advise a querying customer, or a supervisor can gather statistics as to the average length of process completion.

Improved Processes

Improved processes mean customers are more receptive to sales. By providing timely information, automatically generating correspondence and deploying workflow processes for events, you can deal proactively with customer inquiries.

Servicing scenarios include:

Key Benefits

- Matches business processes to operational processes
- Introduces opportunities to cross-sell / up-sell and ensures the sale is handled properly
- Defines, streamlines and standardises processes to improve the consistency of customer servicing or targeted marketing campaigns
- Easily defines the action taken after an event is deployed: memo/tickler, workflow process, correspondence, and/or update contact log
- Reduces risk by reducing the possibility of human error, ensuring the correct conditions are met before an offer is extended to a customer.

- Generate a process to monitor when customers have an insurance claim in process and confirm that all procedures are followed properly
- Change a customer's address and automatically update the contact log, allowing all agents to see when the change was made and by whom
- Automatically generate a tiered response, including correspondence and/or workflow process, when a loan or an overdraft goes into past-due status.

Reduce Risk

ICBS Event Management can help in confirming that the right conditions are met before an event is executed. This saves your institution from extending the wrong offer to the wrong type of person -- cutting down on loan defaults, for instance. Automated routine functions Also, by automating routine functions within the organisation, there is less chance of human error and a reduced risk of incorrect action.

Immediately Access Benefits

ICBS Event Management allows you to begin to improve your customer lifecycle management immediately in response to predefined events. Developed to adapt to your business practices, ICBS Event Management makes it easy to customise the actions that occur after an event is launched, automatically providing your staff with the right tools to sell or service your clients and standardise your processes. Event Management also saves valuable staff time by simplifying complicated events into easy-to-execute actions.

Additional Flexibility WITH ICBS Customer Correspondence

By combining ICBS Event Management with the ICBS Customer Correspondence module, you can produce dynamic correspondence to customers quickly and easily. ICBS Customer Correspondence has correspondence templates that enable a responsive customer-service strategy and ensures that all the correspondence sent out by your organisation upholds the same level of quality and tone as your marketing material. Customer Correspondence also allows you to:

- Use e-mail, fax and/or post to communicate with customers
- Completely brand correspondence
- Log and track all correspondence sent to customers.

Company Overview

Fiserv is a technology leader providing financial solutions to more than 16,000 institutions in over 65 countries. With clients all over the world, we are able to apply the knowledge gained in one market to the challenges of another. Our retail banking solutions are supported by offices in China, Colombia, Costa Rica, England, Poland, Indonesia, Philippines, Singapore, Australia, and the United States. Fiserv combines unrivalled technical and retail banking expertise to meet the needs of a variety of financial institutions, including retail, commercial, private, and central banks; building societies; finance companies; credit unions; and insurance companies.

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