TouchPoint
Elevate Your Customer-Interaction Management

What do customers want? That's easy: just ask any teller. Customers want speedy transactions. However, if you ask your new-accounts representatives, you'll get a different answer: Customers want friendly service from a fully knowledgeable professional who is willing to take the time to explain the products and services that can meet their needs.

Then check with your contact center staff. They will tell you that customers want all of the above. Plus, they want speed, knowledgeable service and one more thing: consistency. The information they receive over the phone has to agree with what they were told in the branch or at the ATM.

As account holders embrace the Internet, the answer changes again – and gets even more complicated. For these customers, resolutions to their requests need to be more than speedy; they need to be instantaneous, accurate and consistent. Their information also needs to be private and secure.

Finally, ask your relationship managers. They will tell you that customers, whether consumer or business, want one-on-one attention and sound advice from highly trained professionals who fully understand their relationship with your institution and their unique financial needs.

The Solution: The TouchPoint Suite from FIS™

FIS' TouchPoint® suite of customer interaction solutions helps financial institutions enhance sales and service performance through all delivery channels.

At the heart of the suite is Xpress™ Enterprise Services, the architecture that enables efficient, consistent, informed communication across all delivery channels, including the branch, the contact center, the internet and your network of relationship managers. The module-based suite enables institutions to address their greatest needs first and then add more capabilities as needed.

Xpress Enterprise Services: The Architecture

Like most financial institutions, you have to handle thousands of transactions that are occurring concurrently at all customer touch points. To meet this challenge, you need an architecture that provides real-time connections to back-end, line-of-business systems – and one that is capable of high performance, scalability and availability.

TouchPoint's customer-centric, front-end channel applications are linked directly to your core processing systems by the Xpress Enterprise Services layer, the foundation and hub of this multichannel delivery infrastructure.

The TouchPoint suite of customer interaction solutions helps financial institutions orchestrate business processes, sales and service for an enhanced, all-channels customer experience.

Never Compromise.

TouchPoint®

With TouchPoint, You Will Have the Solutions You Need to:

• Consolidate customer and account data so service requests can be handled efficiently and effectively

• Automate routine monetary transactions and the administration of cash and vaults

• Improve the account-opening process by simplifying data entry, managing documentation and disclosures, and automatically routing work

• Improve sales effectiveness by managing campaigns, contacts, prospects and opportunities

• Create, send and track sales referrals

TouchPoint in Your Contact Center

In the multimedia contact center, the clock is ticking. When the phone rings or an Internet or e-mail request arrives, there is no time to waste searching for profile screens, and there is no room for cumbersome, multilayer navigation. Your agent needs to be ready to go, fully equipped with complete customer information, to respond efficiently to the request or problem at hand. TouchPoint enables your agents to service the vast majority of phone and e-mail requests from a single screen and quickly generate the appropriate referrals and fulfillment instructions to all areas of your institution. The solution's robust workflow management capabilities automate business processes, no matter how complex the underlying series of tasks. Your institution also can cut implementation costs by taking advantage of TouchPoint's best-practice, out-of-the-box workflow processes such as address change, check orders and research requests.

With TouchPoint, every interaction with your customers, whether by phone or e-mail, is documented – invaluable in the case of a customer dispute. Your contact center managers will have the information they need to set goals, monitor performance, gauge training needs and administer incentive programs. Real-time performance feedback keeps agents informed and motivated – thus reducing turnover.

TouchPoint in Your Branches

If your branches are operating on outmoded technology, you are in good company. As the 1970s turned into the 1980s and then the 1990s, most institutions were lured by the promise of replacing their cost-intensive branches with ATMs, call centers, telephone banking, the Internet and e-mail. Consequently, technology in the branches was neglected.

As technology brought more convenience to customers, they became more demanding – but there was a surprise: They continued to use bank branches. In fact, 90 percent of customers use traditional branches, and more than half prefer the branch as their primary channel.*

Now the emphasis is on branch renewal, and you need to revitalize technology, or your market share will erode. Simply updating localized software and hardware is not enough. You need a way to streamline all your branch processes, from the front line to the back end.

TouchPoint for Your ATM

TouchPoint ATM, the latest channel enablement module in the TouchPoint Suite, is a multi-component solution that enables a bank's ATM fleet to become an integral part of their multi-channel strategy. More specifically, TouchPoint ATM allows a bank to leverage this primary self-service channel to support sales and marketing campaigns, and ensures a consistent experience for their customers across all channels and customer touch points.

The solution supports advanced functionality such as targeted messaging, teller-type transactions, multibranding, faster deployment of advanced services and transaction types, and cross-channel orchestration of customer interactions.

As part of FIS' All-Channel™ strategy, along with the branch, call center, online, and mobile banking, TouchPoint ATM bridges the information silos and leverages the TouchPoint architecture – improving efficiency and enabling all customer information from the various channels to be aggregated for improved customer transparency, heightened customer centricity and increased sales.

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TouchPoint for Your Relationship Managers

If you expect your relationship managers to nurture those high-value customers, you have to foster teamwork across all channels and lines of business. After all, your commercial banking managers, treasury management officers and private bankers cannot do it alone. They need a support system that works together to craft appropriate account strategies and deliver the right combination of products and services that add lasting value – for you and the client.

TouchPoint offers a best-of-breed, sales force-automation and contact-management solution that empowers relationship managers and employees across all lines of business to manage, grow and retain customer relationships. The suite's portfolio-management feature enables users to view and manage their books of business and understand the full sphere of influence for each relationship. Further, it establishes an accountability trail that focuses on retention and share-of-wallet improvement.

TouchPoint's opportunity-management capability fosters collaboration across the organization, enabling employees and teams to initiate and manage sales opportunities, create notes, profile customer needs, schedule reminders across the enterprise – everything necessary to work together toward closing accounts and building relationships. All opportunity-activity information is tracked in a common database so employees at all touch points can identify and act upon opportunities when interacting with customers.

TouchPoint is easily configurable, which means sales processes can be tailored to support the unique sales methodologies of each line of business. In particular, needs-assessment worksheets, sales stages and account-planning tools can be configured easily to meet the diverse sales environment of each franchise in the enterprise, which helps optimize sales performance and strengthen customer satisfaction.

About the TouchPoint Suite

Our TouchPoint suite of customer interaction solutions helps financial institutions enhance sales and service through all delivery channels, including the branch, the contact center, the Internet and your network of relationship managers. At the heart of the suite is Xpress Enterprise Services, the architecture that provides efficient, consistent, informed communication across all delivery channels.

The suite is available in modules, enabling institutions to address their greatest needs first, then add more capabilities as needed.

TouchPoint Service consolidates customer and account data so service requests can be handled efficiently and effectively; provides a customer-centric view with contact history, account relationships, current work in progress and cross-sell opportunities; and includes ready-to-use, account specific profiles and workflowenabled business processes.

TouchPoint Sales helps financial institutions identify, track and close sales, with prospect, opportunity, portfolio and contact management features.

TouchPoint Account Opening re-engineers and expedites the deposit-account opening process; supports the cross-sell of complementary products and services; manages documentation and disclosures; and routes tasks to appropriate areas.

TouchPoint Cross-Sell Manager automates and streamlines the entire referral process from start to finish, and enables representatives to originate referrals for all products, regardless of line of business, and track their status through completion. TouchPoint Cross-Sell Manager recommends the next-best product and intelligently routes opportunities, based on configurable rules, to the appropriate location and user for additional sales efforts and/or fulfillment. TouchPoint Cross-Sell

Manager also tracks previous offers and calculates when/if to re-present.

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TouchPoint Marketer enables the sales force to target the right product to the right customer at the right time, based on local market needs and opportunities. Corporate lists are systematically deployed, and campaign success is tracked throughout the institution. It also enables employees and sales managers to track performance, learn from their successes and quickly share best practices with others.

TouchPoint Business Intelligence empowers decision makers across the enterprise with up-to-date information within their spheres of influence. With the incorporation of industry-leading business intelligence tools, graphical representations of sales performance can be tracked and depicted through charts, graphs, and other analytic tools. With all eyes on the bottom line, TouchPoint Business Intelligence enables decision makers and other key stakeholders to take advantage of access to comprehensive, timely sales performance information.

TouchPoint Teller TouchPoint Teller simplifies teller and branch operations. It enables users to perform monetary transactions, administer and manage cash and vault drawers, leverage cash dispensers and other peripheral devices, perform administrative tasks for managing the teller system and staff, and report on all teller and cash related activities.

TouchPoint Image Capture
TouchPoint Teller also uses the latest imaging technologies for Teller-line capture (while still supporting deferred back counter capture for commercial or large consumer deposits) to reduce transportation costs and to leverage the Risk, Evaluation and Decisioning (R.E.D.) Engine for transit item funds availability. Additionally, Image Capture works with card swipe/PIN pad and touch screen devices to significantly reduce keystrokes and teller errors and therefore promote a more positive customer experience and time for cross-selling opportunities.

TouchPoint ATM enables financial institutions worldwide to capitalize on consumers' evolving expectation that they should be able to bank anywhere, anytime. By leveraging a service-oriented architecture and data aggregation, TouchPoint ATM reconstitutes the ATM channel and provides financial institutions with new marketing and sales opportunities at the only delivery channel historically lacking a qualified direct-sell capability.

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