

Infor CRM Epiphany for Financial Services



➔ Infor's CRM solutions are helping many of the world's largest and most successful financial services organizations to capitalize on current customer relationships, build new ones, and leverage their technology investments.

Be enterprising.

Today's global financial services industry is both complex and competitive. The challenge is to manage rapidly changing global operations and practices while competing for new consumers and maximizing the value of existing customer relationships. In order to survive and thrive, enterprising financial services organizations know they must increase customer retention while expanding products per household, providing outstanding customer service across multiple channels, and reducing cost to serve.

The market-leading Infor™ CRM Epiphany® suite was designed with today's financial services companies in mind. It delivers up-to-the-minute, event-driven intelligence to customer interactions in branches and contact centers through direct marketing channels and self-service systems. Plus, it works seamlessly with existing front- and back-end systems, so you can leverage existing technology and infrastructure investments.



Leverage experience.

As a leading provider of CRM solutions for the financial services industry, Infor has a critical understanding of your competitive requirements, gained through years of successful business and software implementation experience. Our business-specific CRM solution helps companies like yours achieve competitive differentiation in the following ways:

- *Speed time to market*—Generate new sales opportunities efficiently without wasting resources through shorter offer development and implementation cycles. Customize product offerings in real time and find customers who want them now.
- *Realize organic growth potential*—Maximize the full potential of existing customer relationships to increase revenues. Real-time data about your customers lets you anticipate needs and capitalize on spending trends.
- *Maximize your technology investment*—Augment your existing front- and back-end systems and leverage your existing technology investment without additional IT outlay.
- *Foster flexibility*—Increase your strength and resistance to market threats. Rely on Infor's open, adaptable technology for a flexible business infrastructure.

Get business specific.

Infor CRM for Financial Services is a multi-channel organic growth solution that helps retail banks increase products per household and retain existing customers. It does this by optimizing customer interactions across all touch points: branches, contact centers, direct-marketing channels including direct mail and email, and self-service systems including web, automated teller machine (ATM), interactive voice response (IVR), and mobile devices.

Key capabilities include:

Increase products per household

Infor CRM for Financial Services increases products per household and maximizes customer potential by delivering the best cross-sell, up-sell, and retention offers during both inbound and outbound interactions.

Identify next-best action

Sophisticated analytics can be leveraged at the point of customer interaction—whether in the form of an inbound service request or a proactive outreach such as direct mail, email, or call center campaign. A unique blend of real-time analytics and offer arbitration helps you sort through hundreds—even thousands—of possibilities to identify the next best action that optimally aligns your customers' needs and your business goals. You'll be guided seamlessly from accepted service offerings to the next logical step in the purchasing and servicing process, such as opening an account or capturing and routing lead data to the appropriate follow-through system.

Generate personalized interactions and offers

With Infor's powerful CRM solution in place, you'll improve the retention of your best customers while reducing the cost of servicing less profitable ones. The solution reduces churn by recommending the optimal retention offer for each customer, matching the value of the offer to the value the customer brings to your organization. It also evaluates churn and credit scores and highlights customer attributes through which optimal retention offers can be created.

Synchronize marketing

Transform your marketing mix from wishful thinking to customer-driven actions. Infor CRM for Financial Services allows your organization to replace traditional interruption marketing techniques with coordinated marketing processes across both inbound and outbound channels, resulting in uncluttered customer interaction. Whether



you're dealing with an inbound call from a customer, a follow-up request, or action on an expiring CD, this approach results in better customer response and generates up-selling opportunities.

Improve agility

Infor CRM for Financial Services lets you examine contextual factors such as IVR path of the caller, hold time, ATM locations, recent interest rate changes, and online click streams. Marketers can create and customize offers in a fraction of the time of those generated with traditional systems.

Augment existing systems for rapid implementation

Infor CRM for Financial Services allows you to leverage your existing technology investment by coexisting with your current IT infrastructure and plugging into existing branch, contact center, and self-service systems.

Leverage industry best practices

To help you take advantage of industry best practices, the solution includes vertical-specific offer-management data, models, and processes. It meets the specific needs of a multitude of customer-facing roles within your organization and is easily configurable to adapt as your roles and processes evolve.

Components include:

Marketing

Inbound and outbound marketing capabilities help streamline the campaign process and create real-time customer profiles that can be analyzed to identify high-impact offers at the time of interaction.

Sales

Sales force automation and opportunity management capabilities facilitate customer conversations by driving intelligence into every customer interaction.

Service

Personalized contact center capabilities give customer service representatives a unified view of customers across all existing systems and empower them to shorten call times and resolve issues on the first call. Sophisticated, real-time analytics drive personalized, customer-focused processes and offers, turning customer interactions into revenue opportunities.

See results now.

Based on a practical approach that leverages best practices, proven business processes, and strategies built specifically for financial services, Infor CRM for Financial Services enables many of the world's largest and most successful financial services organizations to capitalize on current customer relationships, build new ones, and leverage their technology investments. Let this powerful solution help your company generate a fast return through:

- Increased organic growth capabilities
- Increased products per household
- Streamlined event-driven marketing processes
- Improved flexibility and adaptability
- Easy integration with new and existing technology systems
- Reduced time to market
- Low total cost of ownership

About Infor.

Infor delivers business-specific software to enterprising organizations. With experience built in, Infor's solutions enable businesses of all sizes to be more enterprising and adapt to the rapid changes of a global marketplace. With more than 70,000 customers, Infor is changing what businesses expect from an enterprise software provider. For additional information, visit www.infor.com.

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