



TouchPoint® Sales

Sales Pipeline, Forecasting and More – Right at Your Fingertips

Sales quotas. They can keep you up at night.

Without a comprehensive tool to manage your portfolio, contacts, prospects and opportunities, it's tough to achieve aggressive sales goals. That's because your employees become mired in administrative tasks that take them away from driving sales and deepening customer relationships.

With the pressure on to grow long-term earnings and deliver shareholder value, you need to simultaneously maximize operational efficiencies, acquire new customers and increase wallet share – none of which is easy in a saturated market.

The challenges are compounded if your organization's franchises are far-reaching with multiple product lines. Without timely information at the corporate level, including sales activity, competitive intelligence and revenue forecasts, it's not easy to maintain quality control, gain economies of scale and map strategic growth plans.

Gartner agrees: "Without being able to align the value of customers with the most cost-efficient means of selling, enterprises will squander sales resources while failing to provide top-notch sales interaction with the most favored customers."

The Solution: TouchPoint Sales

TouchPoint Sales from FIS™ is an enterprise sales management platform that helps financial institutions drive long-term earnings growth across consumer and commercial banking business segments. With its built-in, best-of-breed enterprise sales force automation and contact management capabilities, it delivers an integrated, 360-degree view of customer relationships and activity across all delivery channels and all lines of business. Team members throughout your institution have a consistent picture of each customer's total relationship, its impact on your profits and any relationship-building opportunities that have been identified.

TouchPoint Sales Capabilities

Referral management: automate and streamline the process

Forrester research makes a sobering observation: "A minority of existing customers at U.S. banks will consider their bank for their next purchase." But there is hope. They go on to say, "The banks with the best cross-sell potential are seen as customer advocates that offer advanced technology – but that still deliver a superior sales experience in the human-assisted channels."

TouchPoint Sales improves prospecting and lead management performance by enabling

TouchPoint Sales
Features at a
Glance

- Architecture
- Prospecting and referral management
- Customer Profile
- Portfolio Management
- Contact Management
- Pipeline and opportunity management
- Calendar and activity management
- Needs profiling
- Sales Tools
- Sales Tracking and Reporting



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sales opportunities and referrals to be captured, routed to individuals and business units, and tracked across the enterprise. Opportunities cannot slip through the cracks, because an alert is systematically generated to notify the recipient of pending sales opportunities and referrals. With TouchPoint Sales, decision makers across all levels of the enterprise have realtime access to sophisticated tracking and reporting of sales opportunities, referral activities and the sale of new products and services.

Opportunity management: bolster teamwork and speed up sales

The referral management capabilities are further enhanced by TouchPoint Sales' integrated opportunity-management feature. Employees and teams across your company can initiate and update sales opportunities, as well as create notes and schedule reminders – in short, everything necessary to work together toward managing accounts effectively and building relationships. All opportunity activity information is tracked in a common database and is accessible to users throughout the enterprise, including opportunity milestones, competitors, key decision issues and authorized bank and customer contacts. TouchPoint Sales gives you an aggregated, rolled-up view of your opportunity pipeline, which you can easily manipulate to locate bottlenecks or determine the cause of downgraded sales opportunities.

Portfolio management: assign the best customers to your high achievers

TouchPoint Sales' portfolio management feature enables you to assign high-value customers to specific employees so you know they will receive exceptional service. Further, it establishes an accountability trail that focuses on retention and share-of-wallet improvement. With these portfolio management features, your employees will no longer struggle with managing their customer lists using disjointed systems – or worse, paper lists – that provide an incomplete view of the relationship and opportunities. They will be able to view and manage their assigned lists and conveniently retrieve the customer's total account relationship, including a needs assessment, contact history, identified opportunities, communication preferences and more.

Needs assessment: uncover a wealth of information

Your employees have varying degrees of expertise in counseling customers and identifying sales opportunities. That's why TouchPoint Sales includes a handy needs assessment worksheet that walks the user through the collection of information, such as current and future financial goals, current assets and liabilities and expected life events. It also displays key demographic and psychographic information, such as customer value, employment information, personal interests and household information.

Further, users have access to valuable sales tools that improve sales effectiveness, such as scripting, rates, fees, what-if calculators and product features and benefits.

Activity management: keep abreast of follow-up activities

Today's hectic pace makes it tough to stay organized and effectively manage customer relationships, especially without the right tools. That's why TouchPoint Sales includes a task management feature that automates the scheduling and notification of follow-up tasks and appointments. TouchPoint Sales enables users to schedule simple to-do items, manage the completion of complex tasks and delegate actions to others. As activities become due, TouchPoint Sales sends online reminders so important sales and relationship management activities don't fall through the cracks.

TouchPoint Sales enables users to easily schedule and manage appointments for bank and customer attendees. Appointments assigned to team members automatically appear on their TouchPoint calendar. The appointment feature includes configurable pre-call planning and post-call planning tools that enable relationship managers to more effectively manage high-profile customer and prospect engagements. Further, sales managers can review the schedule of appointments for their people in order to ensure they are focusing their activities on the right customers and prospects.

TouchPoint Sales allows users to effortlessly synchronize their appointments, tasks and contact information between the TouchPoint database and industry-standard groupware platforms such as Microsoft® Outlook, IBM® Lotus Notes and Novell® GroupWise. The result:

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improved coordination and enhanced productivity for your sales force.

Contact management: take the guesswork out of selling

Information is powerful. Understanding past interactions can help your employees predict customer behaviors and better address their needs. TouchPoint Sales' contact management capabilities provide a comprehensive view of your organization's interaction with each customer. TouchPoint's contact and event-tracking capabilities track user and system-generated events by date and time, in a central data repository that provides employees with a complete view of customer activity, including inbound and outbound calls, service requests, sales activity and scheduled meetings. Systematically captured events provide institutional knowledge about customer behavior and preferences, enabling your organization to better identify products and services that offer lasting value to customers.

Performance management: gauge progress from enterprise to employee

Executive sales dashboards and detail reports enhance pipeline and sales analysis effectiveness by providing stakeholders at all levels of the enterprise flexible views of key sales, competitors, officer activity and pipeline metrics. Managers and administrators can set sales goals across all levels of the organization and measure performance against them, while users have online access for realtime monitoring of their actual performance against sales goals. Sales results can be exported to industry-standard, incentive management solutions, ensuring employees are effectively recognized and compensated for their sales performance.

Communication management: support for your diverse customer base

Even in your local markets, your customers and employees represent every country on the globe. Communicating in a single language or supporting a single currency does little to strengthen institutional loyalty across your diverse customer base. Through user-configurable parameters, TouchPoint enables you to support multiple languages and multiple currencies within a single-code base. Your agents can select their preferred

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language for all their customer interactions. In addition, you can specify the bank's default currency, an account's default currency and the currency involved with each individual transaction.

Ask for more information about these Touchpoint modules that can help you further enhance your sales capabilities:

TouchPoint Marketer

TouchPoint Marketer is a local market campaign management solution designed to help you instill a customer-centric, value-based sales methodology across your entire enterprise. An optional upgrade to TouchPoint Sales, this add-on module leverages your marketing analytics and customer segmentation systems to deliver campaign leads across the enterprise, while also providing feedback to employees, management and key stakeholders.

TouchPoint Deposit Account Opening

TouchPoint Account Opening improves the new account process for deposit accounts by streamlining data entry, managing documentation and disclosures, and automatically queuing and routing pending work to the appropriate area for handling. Because information is pre-entered and manual tasks and activities are automated, processing time dramatically decreases, and customer satisfaction is enhanced.

TouchPoint Business Intelligence

TouchPoint Business Intelligence empowers decision makers across the enterprise with up-to-date information within their spheres of influence. Within TouchPoint Sales' prospecting database reside tracking and reporting for pipeline activity, opportunity activity, referral activity and the sale of new products and services. 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 Sales Features Architecture

- Multi-tier design separates presentation layer from business logic

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- Enterprise database
- Sales processes configurable by line of business
- Full scalability
- Multi-language and multi-currency support

Prospecting and referral management

- Enterprise database for capturing and tracking prospect data
- Enterprise referral creation and routing
- Electronic routing and queuing of referrals
- Automatic lead tracking and notification

Customer profile

- Customer profile notebook for business and personal relationships
- Consolidated view of customer account relationships, opportunities, contacts, notes and event history
- Hierarchical view of complex business relationships
- View and link customer-to-customer and business-to-customer relationships
- Alerts and communication preferences
- Privacy preferences

Portfolio management

- Assign and reassign customers to relationship managers
- Convenient, list-driven view of customer portfolio
- Easy retrieval and update of customer information, including account relationships, opportunities notes, tasks
- Sort portfolio by last action, last needs-assessment, profitability and more
- Portfolio tracking at all organization levels, including officer, location, business segment and more

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Contact management

- Online display of bank employees and customer contacts assigned to relationships
- Consolidated view of sales interactions
- Call planning and tracking tools
- Systematic capture and tracking of events

Pipeline and opportunity management

- Consolidated view of all opportunity types: campaigns, next-best sells and referrals
- Capture and provide enterprise access to key opportunity information: notes, appointments, tasks, event history and more
- Pipeline tracking of key opportunity data including sales stage, probability to close, projected close date, estimated close amount, competitors and more
- Configurable sales stages and statuses
- Rollup of individual and team pipeline

Calendar and activity management

- Schedule appointments, tasks and calls
- Activities indexed to leads, contacts, customers and opportunities
- Automatic reminders of activities
- Calendar view of outstanding appointments
- Appointment scheduling capabilities for teams of bank employees and customer participants
- Synchronization of data with groupware platforms, including Microsoft Outlook, GroupWise and Lotus Notes
- Configurable appointment planning and tracking tools

