CONNECTIONS CRM

Know your customer better

Understand your customers' needs with a 360-degree view of their accounts and any accounts in their households. Design and distribute tailored product offerings through personalized, custom marketing campaigns. Measure the effectiveness of your promotions without the hassle of manual entry. Build and view management reports and respond to real data with Connections CRM.

What is Connections CRM?

Connections CRM (Customer Relationship Management) is a company-wide business strategy offered by FIS™ that brings together information from all data sources within an organization – and where appropriate, from outside an organization – to give one holistic view of each account holder in real time. This web-based CRM solution interfaces with an institution's core information daily. In today's competitive markets, institutions need to know their customers to provide unparalleled service. To do so requires an understanding of the specific needs of customers and their household account relationships. Financial institutions using CRM have consistently improved profits and account holder retention.

Turn customer satisfaction into customer loyalty with Connections CRM solution – tools that give financial institutions the ability to build one-to-one relationships with:

- The ability to predict product purchases by individual and household
- Knowledge of customized account and household profitability
- A deposit and loan "what if" pricing module
- Automated database marketing fulfillment with ROI measurement
- Tracking of employee sales performance
- Management reports and custom reporting capabilities

A Web-based CRM solution from FIS helps financial institutions compete in the industry while maintaining personalized service levels.

Features include:

- Easy core interfacing
- Low-cost solutions
- Dynamic marketing support
- Rapid deployment

Empowering the Financial World

Increased Revenues

As financial institutions continue to search for avenues of competitive differentiation in today's marketing environment, efforts to implement CRM and its benefits continue to increase. Connections CRM can target and help develop valuable account holder relationships, realign processes, and deliver products and services that are optimal for account holders and the bottom line.

Increased revenues are realized by using Connections CRM to:

- Recognize unprofitable account holders and target them to become profitable account holders
- Increase cross-sell opportunities by using existing account holder information to determine the services households are most likely to purchase next
- Reduce lost sales by improving lead follow-through with automated referrals and recommendations
- Increase employee activity and motivation to generate incremental sales through incentive plan tracking
- Increase marketing effectiveness by specifically targeting the right individuals with the right product at the right time
- Increase opportunities to build profitable, lifetime account holder relationships by recognizing single service households and converting them to multiservice households

Automated Marketing System

Direct mail marketing, call programs and email marketing are effective methods of connecting with clients to cross-sell services and support marketing initiatives. By targeting the right audience with the right offer, the financial institution is letting customers know that their needs are understood. As a result, customers place more value on their financial institution relationships. The Connections CRM automated marketing feature will:

- Directly target account holders using appended demographic data for your existing households.
- Create one-to-one, automated direct mail pieces to existing and prospective customers.
- Create automated email programs to follow up with new customers or to cross-sell to existing customers.
- Create uniform and professional direct mail pieces that your front-line staff may use for customer follow-up.
- Automatically track the results of all direct mail, call and email programs.
- Use the expertise of a marketing specialist assigned to your account to produce professional marketing campaigns.
- Expand your marketing campaigns beyond existing customers by purchasing target lists.

Profitability Analysis

Leveraging your investment is a critical component in every financial institution. The Connections CRM profitability module gives financial institutions a tool to determine the net profit of each account, leading to meaningful profitability measures of households, products, branches and market regions. This is a dynamic tool that, used on an ongoing basis, can significantly improve the bottom line.

Connections CRM will enable you to:

- Market profitable account types to existing households
- Retain high-value households
- Profile profitable households
- Leverage unprofitable relationships
- Increase fee income
- Increase product profitability

Profitability Pricing Module

Enhance profit margins with informed pricing decisions. The pricing module option provides on-demand, profit potential price analysis for individual or collective household accounts in various scenarios. Key features of the profitability module scenarios include:

- Allowing users to model the pricing and profit potential of any household, account, or product.
- Management reporting for employee and institution performance.
- Generating 12-month profitability prediction for households and profitability for the life of loans or deposit accounts.

Contact Us

For more information, contact your strategic account manager.