



ArgoKeys® RelationshipKeys™

Customer Relationship Management

Accurate, accessible customer information can help you design products and services that can increase sales and build more profitable customer relationships. When it comes to understanding your client base, ArgoKeys RelationshipKeys takes the guesswork out of planning and helps you grow your business.

How Well Do You Know Your Customers?

BUSINESS VALUE

- Improve Operations
- Make Money

COMPATIBILITY

- SilverLake System®
- *This solution unlocks customer relationship management potential by intelligently processing the integrated customer information and building comprehensive customer profiles.*

IT WORKS LIKE THIS ...

ArgoKeys RelationshipKeys is a comprehensive customer relationship management solution that automates customer relationship management by transforming ordinary customer data into opportunities for sales and revenue. RelationshipKeys enhances customer service and acquisition by expanding relationships and increasing loyalty.

COMBINE THE EFFORT OF ALL YOUR RESOURCES ...

RelationshipKeys enhances the customer experience and sales process by integrating customer information from numerous applications. This solution consolidates information collected through various delivery channels, profiling sessions, purchased data, and information imported from third-party sources. It prompts the collection of unique demographic data that may not exist elsewhere in automated systems using guided interviews that solicit customer information.

This solution unlocks customer relationship management potential by intelligently processing the integrated customer information and building comprehensive customer profiles, including related accounts, customers, and customer relationships. RelationshipKeys provides near-real-time access to contact management and event tracking, customer/prospect relationship management, referral and complaint processing, workflow and fulfillment processing, campaign offers and management reporting.

KNOWLEDGE INCREASES SALES OPPORTUNITIES ...

This solution's Enhanced Customer Knowledge module gives banks the ability to more effectively sell and service an existing customer base by providing access to enhanced customer information. This module supports the collection, display, and maintenance of supplemental customer information for both business and retail customers. Realizing a customer's financial relationship with other institutions, life changes, special occasions, contact preferences, personal contacts, income, family, and employer information is vital to providing product offerings that reflect the unique needs of each individual.

The Enhanced Customer Knowledge module provides additional flexibility with the ability to customize a bank-defined view in the CRM profile. Banks can define specific questions for collecting customer data that are targeted to their long-term objectives, and store that data in the CRM database. This helps identify sales opportunities and significantly increases the relevance of banks' offerings by responding to specific customer needs.

ANTICIPATE CLIENT MOTIVATION ...

The Relationship Management module categorizes customers into relationships in which a total sphere of influence can be defined and managed. This module allows for more effective management of customers and their accounts and gives bankers a better understanding of what factors influence their customers' decisions.

This customer perspective allows bankers to see data in easy-to-read summaries with key information grouped and displayed for easy access and updating. Bankers can then gauge customers' financial position before moving to the sales process. Relationship information includes customers, accounts, assigned bankers, portfolio tracking, and enterprise comments. Additionally, this module provides access to contact and event data in which interactions between banks and their customers are tracked and monitored.

KEEP AN EYE ON YOUR OPPORTUNITIES...

The Opportunity Management module provides prospect management, consumer offers, and campaign management functions that maximize sales opportunities for both potential and existing customers.

- Prospect Management allows banks to gather and save prospective customer information that can be retrieved and used for future marketing efforts. Prospect records can be easily converted into customer records when accounts are opened.
- Consumer Offers allows banks to attach product offers – whether from specific product requests or from the results of a profiling interview – to an “offers” tab included in the customer profile. Offers can be generated using the RelationshipKeys Consumer Offers Wizard, profiling results, or campaign management functions. This module enables bank personnel to view all pending offers and the source and purpose of the offer, view and modify the status, and add additional comments to each offer. This feature provides bankers with the flexibility to support bank-defined proactive and reactive sales opportunities.
- Campaign Management enables marketing campaigns to be built at various levels of the organization. Each campaign has a primary objective (e.g., retention, expansion, acquisition, or sales cost management), effective dates, management tasks, and customer lists. The ability to push each campaign out to the entire organization or select units is also provided. Results are tracked and available in near-real-time reports for analysis of strategy effectiveness. This function provides campaign call lists in near-real-time that can be used in conjunction with existing SilverLake and RelationshipKeys data. Campaign management provides bankers with the tools they need to grow their proactive sales efforts.

TRACK YOUR CUSTOMERS’ BEHAVIOR ...

The Contact and Event Tracking module of RelationshipKeys maximizes return on marketing and retention efforts by capturing customer interactions. This functionality provides data on customer channel usage and preferences at the account, customer, and relationship levels. Tracking customers’ behavior enables banks to align products and services to customers’ needs and requirements. Events such as third-party identity verification inquiries, product presentations, and account maintenance and loan denials are tracked at the customer level and shared with the entire enterprise to help monitor sales activities, reduce duplicate service requests, and facilitate efficient resource allocation.

MANAGE REFERRALS AND COMPLAINTS EASILY ...

The Referral and Complaint Management module automates the referral process for individuals and business units across the enterprise with online messaging and features for status reports and follow-ups. This module eases the completion and routing of referrals and complaints by using the consumer profile information already on hand, and includes information such as product interest, disposition, originating employee, and destination for the referral. This function’s tracking and reporting capabilities allows banks to measure the effectiveness of the referral process by employee and at each level of the enterprise. Using Referral and Complaint Management, banks reduce expenses through process automation, improve fulfillment and follow-up quality, and increase sales opportunities through faster and more accurate communications.

WHAT IT DOES:

- Combines technology and integrated applications across delivery channels and business lines.
- Captures important customer data, automates manual processes, provides relationship management capabilities and promotes sales opportunities.
- Uses guided interviews to collect demographic data.
- Processes information to build comprehensive customer profiles, including related accounts, related customers, and customer relationships.
- Provides near-real-time access to contact and event tracking, customer/prospect relationship management, referral and complaint processing, contact management, workflow and fulfillment processing, campaign offers, and management reporting.

- Supports the collection, display, and maintenance of supplemental customer information for both business and retail customers.
- Customizes a bank-defined view in the CRM profile.
- Categorizes customers into relationships in which a total sphere of influence can be defined and managed.
- Allows bankers to see customer information in easy-to-read summaries with key information grouped and displayed for easy access and updates.
- Provides access to contact and event data in which interactions between banks and their customers are tracked and monitored.
- Allows banks to gather and save prospective customer information that can be retrieved and used for future marketing efforts.
- Easily converts prospect records into customer records when accounts are opened.
- Allows banks to attach product offers – whether from specific product requests or from the results of a profiling interview – to an “offers” tab included in the customer profile.
- Generates offers using the RelationshipKeys Consumer Offers Wizard, profiling results, or campaign management functions.
- Enables bank personnel to view all pending offers, the source and purpose of the offer, view and/or modify the status, and add additional comments to each offer.
- Enables marketing campaigns to be managed at various levels of the organization.
- Provides the ability to push each campaign out to the entire organization or select units.
- Tracks results in near-real-time reports for analysis of strategy effectiveness.
- Provides data on customer channel usage and preferences at the account, customer, and relationship level.
- Automates the process of making referrals to individuals and business units across the enterprise.
- Eases the completion and routing of referrals and complaints by using the consumer profile information already on hand.

WHAT IT DOES FOR YOU:

- Expands customer relationships, increases customer loyalty and supports new customer acquisition.
- Enhances the customer experience and sales process.
- Enhances banks’ abilities to know their customers.
- Provides the ability to more effectively sell and service an existing customer base by providing access to comprehensive customer information.
- Helps identify sales opportunities and significantly increases the relevance of banks’ offerings by responding to specific customer needs.
- Gives bankers an understanding of what areas of influence may affect customer decisions.
- Allows for more effective management of customers and their accounts.
- Allows bankers to gauge the customers’ financial position before moving to the sales process.
- Provides prospect management, customer offers, and campaign management that maximize sales opportunities for both potential and existing customers.
- Provides bankers with the flexibility to support both proactive and reactive sales opportunities as defined by banks.
- Maximizes return on marketing and retention efforts by capturing customer interactions.
- Allows a bank to align products and services to customers’ needs and requirements.
- Allows banks to measure the effectiveness of the referral process by employee and at each level of the enterprise.
- Improves fulfillment and follow-up quality, increasing sales opportunities through faster communication.
- Enables banks to reduce expenses through process automation, improves fulfillment and follow-up quality, and increases sales opportunities through faster communication.

For more information about Jack Henry Banking®, or to schedule a demonstration or talk to an existing user, email askus@jackhenry.com, call 417-235-6652, or visit www.jackhenrybanking.com.