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📖 **Overview**

CRM and Business Intelligence for DNA®

Leverage Your Financial Institution's Rich, Robust Data to Analyze Performance and Build Stronger Accountholder Relationships

@ the speed of life

Knowledge is power. A knowledgeable staff armed with the right information can build stronger relationships with your customers or members and improve your organization's performance. CRM and Business Intelligence for DNA from Fiserv enables you to leverage information to your advantage, helping you analyze performance, gain valuable insights into accountholder behavior and enhance relationships.

The ability to transform raw data into actionable business intelligence is a key differentiator in profitable organizations. CRM and Business Intelligence for DNA helps you gain that intelligence. You can use the robust solutions in this suite to deliver useful intelligence to all of your customer or member touchpoints; to prepare and analyze reports to track, measure and evaluate marketing programs for cost-efficiency and effectiveness; to improve the service experience for your accountholders; and to make the most informed business decisions.

Attract, Retain and Grow Relationships

Your organization's success depends on your ability to attract, retain and grow accountholder relationships. CRM and Business Intelligence delivers customer relationship management (CRM) tools that empower you to do just that. From improving cross-selling and increasing referrals at the point of sale, to tracking inquiries, routing leads and measuring marketing program effectiveness, the CRM modules in the suite can help you improve top-line revenue and enhance the service experience for customers or members.

Contact Management for DNA

Place relationship knowledge, actionable activities and transactional information at your staff's fingertips with Contact Management, a solution designed to help you maximize every interaction and deliver superior service. Contact Management provides easy access to information from multiple CRM and transactional systems to provide a complete history of interactions with a customer or member, including the channel, length of contact, transactions conducted and staff involved.

→ Manage and track multiple interactions using contact session-management capabilities

→ Optimize every contact using real-time information spanning the entire relationship

→ Increase wallet share by helping your staff suggest timely offers for relevant products and services

→ Improve efficiency using workflow-enabled functionality

→ Protect personal information and reduce fraud risk through the robust authentication and validation features

Activity Manager for DNA

Managing sales leads, service requests and marketing programs is critical to building relationships, and Activity Manager helps you do so. This business process management solution tracks sales and service opportunities and routes them to the right employee, maximizing your return on leads and referrals while improving service.

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Activity Manager uses customizable, automated workflows to manage and streamline your sales and service processes. Use it to track, manage and report on activities and to provide marketing, operations, service and sales staff with the activity data they need to better manage employee assignments.

→ Monitor sales activities and report outcomes, comparing employee or branch-level performance

→ Ensure you meet or exceed sales goals by giving branch managers greater control of employee assignments

→ Improve accountability by tracking referral activity

→ Improve accountholder satisfaction by gaining a full view of activities to ensure every interaction continues the conversation and service experience

Publisher for DNA

Extend your strategic vision from the boardroom to the front line with Publisher, a customizable portal page providing access to all solutions in the CRM and Business Intelligence suite, along with intranet communications, online documents and internet links. Publisher gives your staff a personalized, single point of access for viewing customer/member and account information that enhances front-line support, marketing and reporting.

Publisher enables you to deliver report data, charts and graphs to knowledge portals that can be personalized to each employee's role and preferences, helping your staff plan marketing initiatives effectively. Publisher enables customized, browser-based access to published resources such as internal documents, spreadsheets, reports, marketing brochures/flyers, staff communications, rate sheets and other product data, and URLs for sites that are frequently used within the organization. A comprehensive dashboard displays summaries such as sales totals, branch performance and service levels, each reported in a variety of formats tailored to an employee's requirements.

→ Customize data views for individuals or groups with similar needs

→ Empower staff members to customize their own Publisher pages

→ Quickly populate portals with data from other sources

→ Use the report scheduler function to deliver up-to-date information

→ Save time and money by eliminating paper reports

Report Writer for DNA

This powerful, flexible report generator meets a wide range of needs – from simple lists to complex summary reports. Because it is integrated with the DNA account processing platform and compatible with application databases such as Oracle, IBM DB2® and Microsoft SQL Server™, Report Writer can report on data from multiple databases on multiple platforms. The solution simplifies report distribution by enabling you to print or save reports as PDFs or e-mail them to individuals or groups.

→ Customize report design and layout or choose from preprogrammed report templates

→ Simplify ad hoc reporting using a web-based, intuitive query and report writing tool that improves efficiency

→ Aggregate data in a single view from multiple sources, such as account processing, investment, lending, general ledger, marketing and insurance systems

→ Integrate with Publisher to schedule daily, weekly or monthly report runs

→ Customize data views easily by collapsing and renaming tables and data elements with user-friendly names

→ Choose from many output options, including electronic files such as comma-separated or PDF files, spreadsheets or Microsoft® MapPoint

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Connect With Us

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Fiserv is driving innovation in Payments,
Processing Services, Risk & Compliance,
Customer & Channel Management and
Insights & Optimization. Our solutions
help clients deliver financial services at
the speed of life to enhance the way
people live and work today.

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