Proven Solutions for Financial Services

HELPING YOU TO PROVIDE COMPREHENSIVE FINANCIAL OFFERINGS

In an ever-increasing effort to expand market share, financial services providers are offering a distinct value to their clients through a broad spectrum of products and services. Today's clients demand immediate access to their account information, personalized products and services, and advanced technology solutions that satisfy their financial needs. As a single-source communications provider, Inter-Tel can help financial services providers accomplish their unique business goals.

Inter-Tel's wide range of solutions enable your business to:

- Differentiate from the competition by offering value-added, convenient client or member services
- Increase the productivity of your staff
- Make informed business decisions based on vital real-time statistics
- Reduce business expenses and streamline operations
- Facilitate the mobility of traveling or home-office employees

FIND INSIDE

Applications Platform: IVR
Call Center Suite
Enterprise® Conferencing
Unified Communicator®

Client Relationship Tools

Customers and clients require 24/7 access to convenient services—enabling them to access account information; make transactions, trades or payments in real-time; and hear up-to-date financial statistics or stock information.

Solution: Offer your customers value-added services by implementing flexible Interactive Voice Response (IVR) applications, tailored to address your unique business needs

Applications Platform: IVR is a flexible platform that supports customized applications and speech-enabled solutions such as Automatic Speech Recognition, Text-to-Speech and Biometric Speaker Verification—designed to help you provide convenient services to your clients. The platform also provides inbound or outbound message notification capabilities. Your customers and clients can either call your organization at their convenience to manage their accounts, or automatically receive alerts when stock prices change or account balances reach a certain threshold.

Inter-Tel's IVR solutions can enable your valued customers and clients to:

- Access account information; transfer funds; check balances; reset passwords; order statements and checks; locate branches and connect to a live account representative
- Conduct stock trades; listen to current stock prices and the latest financial news
- Obtain account balances and make payments using a credit card

Financial services providers often implement small workgroups or even large call centers responsible for sales and customer service. Financial services providers need insightful tools that enable them to evaluate call statistics and employee performance to make informed business decisions.

Solution: Implement flexible real-time and historical reporting tools, optimizing employee and business performance and enhancing customer service levels

Call Center Suite is a collection of productivity management solutions, including agent and workgroup tools and call logging and recording solutions. This collection of flexible tools provides key statistics on agent productivity and cradle-to-grave call activity. Managers can access reports via a Web browser; monitor agent activity and availability; and more—arming them with the tools they need to run a productive and streamlined call center or workgroup.

Inter-Tel's Call Center Suite software can enhance your business by providing:

- Real-time and historical statistics, which can be used to increase employee productivity, facilitate exceptional customer service and improve business operations
- Lists of unreturned, abandoned calls for business recovery—minimizing revenue loss
- Automatic screen pops of vital client information so employees can service calls efficiently and promptly
- Silent monitor and recording capabilities to improve agent training and enhance quality assurance efforts

WHAT THEY SAY

"The Inter-Tel system has been very reliable for our organization. It has been instrumental in providing real-time statistics and reporting information for our contact center. The end result is positive reinforcement for our sales associates in meeting their service quality requirements and incentive goals."

–Barb Hoagland, Executive Assistant, KEMBA Financial Credit Union, Columbus, OH

Office Management Solutions

Financial services providers often need to present information and collaborate in real-time with clients, vendors and employees. They require a cost-effective, secure solution that enhances the way they do business and differentiates them from the competition.

Solution: Create a real-time enterprise environment connecting your business to dispersed resources and clients

Enterprise® Conferencing software is a cost-effective audioconferencing and Web presentation solution designed to address your business's real-time communication needs. With the personal touch of Web-based presentation capabilities, your business can immediately convey critical information to geographically dispersed resources. The ability to conveniently present information in real-time to your resources and clients helps your business reduce travel expenses and improve group synergy and customer relations.

Inter-Tel's Enterprise Conferencing solution provides many practical uses:

- Keep distributed resources and customers informed of the latest offerings, policies or upcoming events
- Present current stock performance charts and data to clients—expanding your service offerings
- Relay key corporate news to industry analysts and members of the press
- Record conferences for security and quality assurance purposes
- Set-up billing or project codes associated with any call for accurate client billing

Many executives and employees are on-the-go, dealing with pertinent business matters. Some financial institutions and firms are faced with the communication and financial challenges of home-office employees or remote locations. Employees and executives need to be able to manage their communications no matter where they are.

Solution: Provide your associates with a flexible tool that enables them to control their communications from anywhere

Unified Communicator® software helps your employees stay in control of their communications to facilitate increased sales opportunities, enhanced client satisfaction and improved interaction among fellow employees with integrated presence management tools. Unified Communicator software enables associates to access phone system features, enable routing rules, change availability and more from any Web browser, cell phone or handheld device.

Inter-Tel's Unified Communicator software provides numerous smart business uses:

- Create simple routing rules to ensure you receive urgent calls no matter where you are; or route lower priority calls for immediate attention when you're unavailable
- Record customized greetings for particular clients when you're unable to answer calls
- Inform office staff of your availability (e.g., at lunch, out of the office, Do-Not-Disturb)
- Access your address book and speed-dial clients and contacts—addressing business matters quickly

"The Inter-Tel phone system offers a tremendous amount of flexibility for our bank. Especially beneficial are the hunt group capabilities and call routing features, which allow us to handle customer calls with enhanced speed and efficiency. From the extensive voice mail system to conference call features, the system is extremely intuitive and user friendly."
–Ron Lynch, Chief Operating Officer, The Commerce Bank Washington, Seattle, WA

ADDITIONAL BUSINESS-ENHANCING SOLUTIONS FROM INTER-TEL

Inter-Tel offers numerous other communications solutions, enabling financial services providers to reduce operational expenses, reach more clients and improve the way their associates communicate.

Inter-Tel's comprehensive products and services can enable your busy financial institution or firm to:

- **Network** multiple locations or branches together, eliminating long distance expenses and centralizing voice mail
- Eliminate overhead paging; view the availability of coworkers and groups; and process calls quickly via touch screen, mouse or keyboard using **attendant software**
- Facilitate the mobility of associates with **wireless phone solutions**
- Streamline business operations by providing **local and long distance** services, **data, WAN, Internet** connectivity, **professional** services and **custom** solutions

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Some features or applications mentioned may require a future release and are not available in the initial release. Future product features and applications are subject to availability and cost. Specifications are subject to change without notice. Some features may require additional hardware and/or specific software.

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