

## **Customer communications for financial services:**

### **ITP/Customer Communications Management**

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#### **Do you want:**

- consistent communication with your customers, based on their preferences
- the flexibility to use mail, email, text, messaging, portals, fax or print
- compliance with current legislation, industry regulations and branding standards
- your customer relationship management (CRM) system to integrate with existing applications, without the need to modify or update your software



#### **What we do:**

Aia Software's ITP/Customer Communications Management helps financial services professionals reach customers with relevance, quality and speed. ITP/CCM enhances your customer communications to strengthen relationships and build loyalty.

# What is the challenge?

Financial services organizations face constant challenges in maintaining customer relationships. Regulatory compliance, negative economic conditions, legislation changes and general market noise are some issues that stand in your way.



## Make it easy to access information

We have many options to reach customers today. Multi-channel delivery has been particularly helpful in keeping us closer to customers in the finance market. Busy people appreciate being able to check the progress of a deposit via a web portal, or being kept up-to-date on a loan approval by email or text message. Financial services providers have a strong advantage, because messages involve a subject that is always important to customers - their finances. Customers will demonstrate their loyalty when you make it easy for them to access and understand their accounts.

## Follow through on your commitment

Your information is more likely to be read when it's presented in a way that matches the reader's media usage and preferences. Delivering that information using a channel that best suits your customers builds confidence in the relationship and makes them reluctant to switch providers. It is essential to capture customers' preferences and follow through in using them when selecting a communications channel. ITP/CCM makes it possible to meet that commitment. A link to your CRM system ensures a customer's communications profile is used appropriately for each contact. Capturing all information in one profile and linking that to different output systems ensures delivery corresponds with each customer's preferences.

## Can you easily integrate legacy applications with your CRM?

Legacy financial applications are notoriously difficult to modify. Often, customer details are not updated in these systems when changes are made in the CRM system. This leads to problems when using the legacy system to send mail instead of email, despite the customer preferences recorded in the CRM system. Consistency across all communications is paramount, or the disconnect will jar customers and damage their perception of your service. Regulatory and corporate compliance should also be taken into account from customers opting out of receiving marketing materials to ensuring you do not breach anti-spam legislation. An integrated approach to customer correspondence that uses CRM data to integrate both legacy and new documents is essential. The solution is Aia Software's ITP/CCM.

Business managers will appreciate the ability to manage processes around customer communications. In addition, busy IT professionals will find ITP/CCM makes their job easier. By gathering output data from your various legacy, operations, IT and CRM applications, and using profiles, industry regulations, business rules and branding standards, ITP/CCM will analyze, manage, combine and distribute all of the company's output appropriately and automatically. What's more, you can easily use preferred communication channels from legacy applications, such as email or portals, without the need to modify those sources.

## How ITP/CCM Enterprise coordinates your communications

Suppose your customer has a personal loan to finance a family car. Due to changes to his details, such as refinancing or a loan payoff, he needs an updated loan statement. A marketing letter is also scheduled to go out at the same time.

ITP/CCM clusters these two documents so they are not sent separately, but in one envelope. Or, if your customer prefers, both communications can be attached as PDFs within an email. Your correspondence becomes more personal and responsive to your customers' preferences. Clustering or 'householding' documents also means postage savings.

What CCM can do	What that means in practice
Capture communication profiles	Business managed environment for defining communication rules and preferences
Integrates with legacy	No need to change, update or replace existing applications
Analyses, manages, combines, improves and distributes output	Optimum use of customer communication profile, with workflow efficiency and cost savings
Links to CRM	Communicate with each customer using preferred channels - email, fax, text message or print
Facilitates regulatory compliance	Proper use of approved text and quick adaptation to legislation changes
Let business users manages communication channels independently from IT	Quicker adaptation to changing market circumstances without assistance from the IT department

Contact us today to arrange an assessment and discover how Aia Software's ITP can help your organization deliver personalized one to one communications that will drive customer loyalty

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**Meet us on the web:**

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