Adobe solutions for branch servicing

Engaging more effectively with customers and improving service efficiency

Maximizing productivity

Adobe solutions help branches:

- Deliver more personalized service to customers—with the same staff
- Improve retention, cross-selling and upselling
- Streamline processes and reduce costs
- Ensure consistency across channels

Adobe LiveCycle ES

- Streamlines and automates business processes to help people interact with information more effectively
- Enables financial firms to create engaging online applications that make processing customer requests more efficient and accurate
- Features dynamic document generation to help financial firms create more personalized customer communications

To attain a competitive edge in the banking world, it's crucial for banks to differentiate themselves. Successful banks understand that building strong customer relationships is a key differentiator and that branches are one of the most important channels for effectively engaging with customers.

Investing in the branch experience is paramount. While meeting customer expectations is getting harder and harder, Adobe solutions for branch servicing help branch employees personalize customer contact, foster new customer relationships, and improve cross-selling.

Creating an engaging customer experience

Adobe solutions for branch servicing empower account representatives, tellers, and loan officers to spend more time meeting their customers' needs and less time searching for customer data, learning about new products, and executing basic processes.

The solutions, based on Adobe® LiveCycle® ES (Enterprise Suite) software, help accelerate processes—such as completing and reviewing applications, filling out loan documents, and obtaining approvals—to make them more efficient, productive, and personalized.

Improving and automating branch processes

Banks can improve the effectiveness of their branches by leveraging the capabilities of LiveCycle ES. They can facilitate more engaging customer interactions and help ensure that branch employees always have the information they need to do their jobs.

For example, Adobe technology enables branch employees to access a single comprehensive interface with the customer and product data they need for effective selling. With this tool, employees don't have to hunt through multiple screens when servicing a customer. Instead, they can quickly view the customer's entire banking history, as well as relevant product information, on one screen. They can also sort information on key customer parameters, making it easy to analyze the pros and cons of each product line. This helps guide selling, increase productivity, and improve service.

Branch employees also benefit from the solutions' data capture capabilities. These capabilities enable prepopulation and validation of forms, eliminating the need for employees to type in and verify customer information themselves. When customers change their personal information, it saves time and reduces errors by automatically populating the changes in all the customer's files throughout the entire bank system.

Adobe®

Automation lowers costs

Customer account enrollment and maintenance can cost a company up to 35% more than its projections, due to manual steps and rekeying. Adobe solutions automate forms processing, helping branches save valuable time and money.

"More than ever, Adobe LiveCycle solutions meet the rapid development and rollout required for these projects."

François Schotte
Marketing communications director
Natexis Banques Populaires' Financial Services

Adobe Acrobat Connect Professional

- Helps institutions create, deploy, and modify highly engaging online training modules
- Offers easy and fast online training, giving managers and agents the ability to stay on top of new products and services
- Enables managers to easily develop and update new training modules, ensuring that information offered to agents is always current and correct

For more information

For more details about Adobe solutions for branch servicing, visit *www.adobe.com/financial/solutions/branch_automation*, e-mail *FSIpractice@adobe.com*, or call 888-649-2990.

Branch servicing

Streamlined intuitive interface

Simplified access to the display of an individual customer's information

Dynamic and engaging visual display of data

Automated processes

Automatic validation of new data upon entry for accuracy

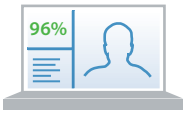
Data extraction from completed forms updates CIFs as required

Dynamic document generation

Dynamically generated applications, rate sheets, and other forms as PDF documents, customized for each individual customer

Convenient interactive training

Interactive eLearning modules can be completed at an employee's convenience



Progress tracking ensures staff remains informed of new services and procedures

With Adobe solutions, forms are prepopulated with customer information using XML data, printed for signing, and then rescanned to Adobe PDF files in the branch. Client data is automatically saved to the bank's customer information file (CIF). Branch IT bandwidth is used efficiently by transmitting data only, not formatted documents.

Another benefit is dynamic document generation. After a customer consults with an agent, the agent can instantaneously produce a packet of recommendations and information based on the customer's needs. The result is a tailored and personalized customer experience.

Adobe Acrobat® Connect™ Professional software enables banks to provide quick and easy online training on the latest products and services for customer service representatives, branch employees, and corporate employees. As part of Adobe's eLearning solution for rapid training, Acrobat Connect gives institutions everything they need to rapidly create, manage, deploy, and track highly engaging online sessions that everyone can access instantly. Managers can easily develop and update training modules, ensuring that the information offered is current and correct for their internal teams or the customers they serve.

A platform for customer engagement

Adobe solutions for branch servicing give branch employees the ability to offer faster, more personalized service while helping to cut costs. Employees can intuitively access customer information and experience the benefits of process automation and integration, dynamic document generation, and convenient, interactive training opportunities.

Tight integration between LiveCycle ES and branch systems enables branches to leverage the same technology across multiple channels. Adobe's intuitive and familiar interface minimizes training for both branch and back-office staff.

These comprehensive, cost-effective solutions help branch personnel establish and maintain productive, highly personalized relationships with customers. The end result is an increased opportunity for successful selling.

Adobe

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