



*TouchPoint Branch™*



*Where Company & Customer Connect*



## Introducing the Latest Innovation in Retail Delivery — The Branch.

*While customers have adopted a variety of new delivery channels, the branch has not gone away. In fact, when TowerGroup recently surveyed consumers, 92% stated they had visited a branch within the month. However, the branch is changing... and so are your customers' expectations.*

Today your customers are completing transactions using a combination of delivery channels including the branch, Internet and contact center... and they expect consistent service regardless of when or how they choose to interact. But your delivery channels continue to operate independently. As a result, your branch platform personnel can't easily access information provided through other delivery channels, requiring more time and redundant efforts to complete transactions.



*TouchPoint Branch™*, a component of WebTone's *TouchPoint®* solution, enables branch personnel to respond quickly and effectively to customer service requests while taking advantage of the interaction to cross sell appropriate products and services. First installed in 1997, *TouchPoint Branch* allows you to connect the branch to other business units and delivery channels, empowering representatives with complete customer and contact data — as well as the ability to act on that knowledge.

More than just a sales force automation or customer service tool, *TouchPoint's* power is its ability to combine more than 400 discrete sales, service, fulfillment and monetary transaction capabilities into a fully integrated, web-based CRM solution. Leveraging an enterprise integration layer, *TouchPoint* allows you to deliver consistent, personalized sales and service throughout the enterprise, resulting in enhanced customer relationships, improved service levels, reduced service costs, and increased customer profitability and lifetime value.



**As your most expensive delivery channel, how can you make the branch more efficient and profitable... and meet your customers' demands for anytime, anywhere service?**

**Do your branch personnel have the tools they need to initiate and complete customer transactions quickly and effectively?**

**Or are they struggling with...**

**An inability to access data from alternate delivery channels.**

*TouchPoint Branch* provides a fully integrated CRM solution that allows branch personnel to access and act on information and processes generated through other delivery channels such as your contact center and Internet banking applications.

**Separate workstations for conducting sales, service and monetary transactions.**

*TouchPoint Branch* seamlessly integrates with *TouchPoint Teller™* for a fully integrated workstation with sales, service and monetary transaction capabilities.

**Cumbersome, manual new account opening and fulfillment processes.**

*TouchPoint Branch* provides new account opening processes that are powered by *TouchPoint's* workflow module. As a result, branch representatives can open new accounts online for all deposit and consumer loan products, and *TouchPoint* automatically completes the associated fulfillment tasks such as document preparation, host uploading, forms printing, and items processing.

**A lack of cross-sell and referral tracking capabilities.**

Because *TouchPoint Branch* can be fully integrated with other delivery channels, referrals and cross-sell opportunities can easily be initiated and tracked across your entire organization. Its portfolio and opportunity management features allow branch personnel to record and refer sales opportunities as well as manage their individual sales pipelines.

**No efficient means to stay in touch with your customers.**

*TouchPoint Branch* provides a detailed, customer-centric profile of each customer and prospect, displaying their complete financial relationship. Notes and profitability indicators help to uncover customer needs and financial goals for future sales and service activities.

Designed specifically for financial services, *TouchPoint Branch* offers:

- Robust sales and service functionality
- Integrated opportunity and pipeline management
- Automated new account opening and fulfillment
- Consolidated customer and contact data
- Automated workflow capabilities
- Seamless delivery channel integration
- Multimedia handling
- Graphical, configurable reporting functionality
- A highly scalable, distributed architecture
- Support for Windows® and UNIX® platforms



**For more information about how *TouchPoint Branch* can help your branch personnel more effectively and profitably interact with customers, visit [www.webtonetech.com](http://www.webtonetech.com), or call 866-webtone.**

## *TouchPoint Branch Successes*

Installed throughout the branch networks of retail banks ranging from \$16 billion to more than \$700 billion in assets, *TouchPoint Branch* has enabled...

- a global retail banking giant to satisfy 80% of customer requests from a single *TouchPoint* window
- a Midwest regional bank to consolidate data from more than 20 disparate back-end systems into one consolidated customer and account profile, dramatically reducing the time required to respond to customers' sales and service requests
- a Southeast regional bank to reduce its system training time from two weeks to two days when implementing *TouchPoint Branch* and *TouchPoint Contact Center*



3390 Peachtree Road • Suite 600 • Atlanta, Georgia 30326 • 866.webtone • [www.webtonetech.com](http://www.webtonetech.com)