

Exchange Solutions – The Customer Engagement Experts™

Exchange Solutions designs, builds and operates intelligent customer engagement programs that substantially improve our clients' customer acquisition, retention and profitability.

Intelligent Customer Engagement programs put the customer in control of their relationship with a company, by allowing them to configure the value exchange – incremental behaviors in exchange for incremental benefits. This can occur at any point of interaction, in real-time, across all channels. Intelligent rules ensure that the outcome of this exchange will be increased value for both the customer and the company. This approach inverts traditional marketing programs, which push offers and observe acceptance rates, and yields deeper, stronger and more profitable customer relationships.

Exchange Solutions delivers our programs via our Managed Services Platform which allows for rapid time to market, customized to our clients' needs. Our proprietary approach and in-market learning helps our clients realize quicker results, better ROI and deeper and more enduring levels of customer engagement than traditional loyalty programs.

Intelligent Customer Engagement for Financial Services

Intelligent Customer Engagement for Financial Services addresses four key pain points by helping financial institutions:

1. Maximize share of wallet with every customer, helping them incent their customers to consolidate their financial products and services with the bank
2. Reduce the attrition rate of customers and balances
3. Allocate their employees' time to higher value and higher potential customers
4. Identify their highest potential customers and better equip their sales teams to retain and deepen those financial relationships.

The challenges financial institutions face are often compounded by operating in multiple countries or markets, each with very different product economics, market position and market competitiveness. That's why our solution is easy to implement and fully adaptable to each market situation.

How It Works

Intelligent Customer Engagement for Financial Services consists of a Managed Services Platform and supporting processes that enable the organization and its front line sales teams to better engage each and every customer, thereby deepening the relationship and increasing share of wallet and profitability.

This includes:

- Effectively leveraging every customer interaction as an opportunity to expose the customer to the benefits that the bank is willing to offer in exchange for specific behavioral changes from the customer (e.g. opening a new bank account, transferring a credit card balance, transferring a mortgage)
- Empowering the customer to choose the mix of behaviors and benefits that are most to his / her liking
- Ensuring that any behavioral configuration chosen by the customer results in incremental profitability for the bank

The solution can be effectively leveraged across multiple channels (in person, online, or over the phone from a call center).

An In-Market Example

An implementation of our solution by a major financial institution was rolled out across its branches in 22 different countries. Some of the in-market results include:

- Customers committing to bringing \$600 million in incremental balances to the bank
- On average, across the 22 countries, 35% of these 'promised balances' are being brought in as new business (FY10-FY13)
- Countries that have used the program for over 6 months are moving over 75% of the promised balances
- In determining the lift and ROI of the project, the solution - compared to a control sample of customers - delivered 70% increase in balances and 72% increase in profits

The bottom line? The organization is experiencing more than a 70% increase in incremental profitability by implementing an Intelligent Customer Engagement program from Exchange Solutions.

Learn More

To learn more about how Intelligent Customer Engagement for Financial Services can help your organization drive incremental customer behaviors, maximize profitability and ROI, please contact:

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