

Smart Communications

# SMARTIQ™

## Banking and Financial Services



### Transform Digital Customer Engagement

Whether you're a large global funds manager or a regional credit union, your customers expect fast turnaround and personalized, digital and mobile experiences.

Say goodbye to old, expensive paper-and forms-based manual processes. Say hello to mobile-ready, adaptive customer experiences that save time, deliver efficiencies and build brand loyalty.

SmartIQ empowers you to streamline data-driven interactions along the entire customer journey, from new account opening to onboarding to servicing and growth. Whether in-person with a financial advisor, at home on a laptop, or on a mobile phone, your customers can enjoy a seamless experience, and get the answers they need quickly, with less friction.



### Mobile-enabled Adaptive Experiences Replace Static Paper/Web/PDF Forms

- Rapidly transform PDFs and HTML forms into intuitive adaptive interviews that can seamlessly move from desktop to mobile
- Seamlessly connect to your core systems of record to make your interactions smarter and more relevant
- Incorporate experience-driven workflow to manage reviews and approvals
- Speed up transactions and customer response time with integrated e-signatures
- Deliver personalized documents and even complex document packages on demand in real time



### Quick Connectors Enhance Personalization and Drive Efficiencies

With SmartIQ Quick Connectors, data can be brought in from existing CRM, ECM or WCM systems—or even core banking platforms, such as Fiserv or Jack Henry Symitar. This means customers can confirm the information you know about them already, instead of rekeying it in. And, you can deliver a more personalized interaction. Instead of asking irrelevant questions, use the data you have to steer the conversation based on your business rules and the customer's needs. Finally, update your systems automatically with the new information you collect along the way.

### Learn how to replace paper and static digital forms with guided, personalized interviews:

- Account Service Forms
- Dispute Processing
- Fraud Reporting
- Skip-a-Payment Forms
- Credit Card Account Maintenance
- Tax and other Request Forms
- Credit Card Applications
- Personal and Commercial Loan Applications
- New Account Opening Applications



Vanguard®

 VOLKSBANK



Dow Chemical Employees' Credit Union



### Experience-driven Workflows Make Business Process Management Easier

SmartIQ incorporates a fully integrated, customizable workflow engine so you can initiate and route tasks based on the customer's unique experience and needs, either in specific order or in parallel to other activity. Electronic signatures can be incorporated into any workflow, reducing friction and making the experience appear seamless to your customers. Streamline collaboration, reviews and approvals with reduced risk of error.



### On-demand Customer Communications Increase Engagement and Ensure Compliance

SmartIQ, along with the power of SmartCOMM's next generation CCM, enables fast, accurate production and delivery of personalized communication that is multi-channel, multi-format outputs tailored to individual business requirements and delivery methods, such as Microsoft Word, PDF, SMS, email, XML/HTML, Excel and PowerPoint — even industry-standard forms for archiving.



### Data Analytics Modules and Dashboard Help You Understand and Improve Close Rates

Delivering an omnichannel experience for your customers is made easy with SmartIQ. Get access to actionable insights so you can use accurate, current and expansive data sets to inform the right decisions around all your processes and maximize close rates.

## Key Financial Benefits

- Close more business and improve revenue by responding faster to customer inquiries
- Reduce development time to build new digital applications by more than 75% — and reduce IT demand by empowering business users
- Improve Not In Good Order (NIGO) form submissions from 35% to less than 2%
- Reduce call center and branch costs with 24/7 digital and mobile-friendly interactions
- Slash paper and postage costs
- Eliminate the need to rekey data or scan with OCR tools
- Build customer satisfaction and loyalty scores
- Minimize risks and improve compliance with KYC and other regulations



“One of our bank's biggest goals is to increase our core deposits. We need quick, user-friendly processes and applications that can help us acquire those new customers and keep our current customers. We really love how customizable and easy-to-use the platform is. We've been very happy with the responsiveness of SmartIQ and their customer support.” - FNB of Utah



[www.smartcommunications.com](http://www.smartcommunications.com)

### Connect With Us



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### About Smart Communications

Smart Communications™ is the only provider of a customer conversations management platform. More than 500 global brands rely on Smart Communications to deliver smarter conversations across the entire lifecycle—empowering them to succeed in today's digital-focused, customer-driven world while also simplifying processes and operating more efficiently. This is what it means to scale the conversation. Smart Communications is headquartered in the UK and serves its customers from offices located across North America, Europe, and Asia Pacific. The Smart Communications platform includes the enterprise-scale customer communications management power of SmartCOMM™, forms transformation capabilities made possible by SmartIQ™ and the trade documentation expertise of SmartDX™. To learn more, visit [smartcommunications.com](http://smartcommunications.com).