

: Thursday, November 13, 2003

## HM Chou

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**From:** David Pittman [dpittman@initiatesystems.com]  
**Sent:** Thursday, November 13, 2003 12:33 PM  
**To:** Hsuan-min Chou (E-mail); Blythe Howard (E-mail)  
**Subject:** FW: Do you want better real-time customer interactions?



Improve profits  
and customer-centric initiatives

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### Tie all your customer data together for a true, 360° customer view

Do you have a single, complete view of your customers so that you can have more profitable and effective interactions with them?

Can you link all records for a customer and his or her household across all your systems and lines of business?

Do you know how to increase customer retention and enhance customer loyalty?

If you are like many banking executives we've spoken with at national and regional financial institutions, your answer is "no" to at least one of these questions. At best, this costs your bank operational efficiency and effectiveness. In the worst case, you'll lose customers and find yourself at risk for fraud and liability.

#### Initiate Systems can help you:

- ▶ **Improve customer-focused business strategies** -- by integrating any volume of structured data across disparate systems and sources on demand, you give your CRM, call center, business intelligence and other applications a 360° view of the customer when and where they need it
- ▶ **Drive real-time recognition of your best customers** -- with customer records accurately linked, you can complete transactions more efficiently, cross-sell and up-sell more effectively, and resolve customer service issues faster
- ▶ **Gain a competitive advantage** -- by "virtually integrating" data, you can get more thorough business intelligence and develop new information-based revenue opportunities

With Initiate Identity Hub™ software, **you can engage in informed real-time interactions with your customers to improve customer retention and loyalty.** For example, when a customer calls for service, asks a question or airs a complaint, Initiate Identity Hub software can quickly find and link all the records relating to that customer across all your product and business

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lines. This gives your CSR or account manager a "virtual snapshot" of the customer's entire account, such as the value of individual accounts and total combined value, length of tenure with your organization, and specific products and services used.

By integrating customer data and improving its quality in your applications and data sources, Initiate Systems provides the accuracy and agility you need in strategic business initiatives to drive the on-demand enterprise.

To learn more about how **Initiate Systems improves customer data integration**, contact me today at (312) 759-5029 or [dpittman@initiatesystems.com](mailto:dpittman@initiatesystems.com), or [click here](#).

Regards,

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P.S. Learn how Initiate System's customer data integration applications can also help you [make better strategic and operational decisions and achieve better risk management and regulatory compliance](#).

[Click here](#) if you do not wish to be contacted by email in the future.

