

A bank manager wants to be able to contact customers about bank promotions in order to sell more loans. He wants to be able to target specific customers based on the type of accounts they have, as well as balances and types of current loans.

Solving this challenge will benefit the business in the following ways:

- ◆ By sending pertinent promotional, or advertising information to a focused group of customers, the bank should experience more positive results for their promotional efforts
- ◆ By using a phone campaign instead of paper, the company runs greener, and each campaign costs less
- ◆ The bank's customers should feel like the bank is listening to them or better understand their banking needs because only pertinent campaigns are being sent to them leading to improved customer loyalty
- ◆ By using a phone campaign based on up-to-date customer data, the bank can run campaigns quicker with less delay waiting for printing and mailing, leading to more timely customer service and interaction



THE SOLUTION

The focus of this solution is to create an automated Dial Out function tied to the bank's customer database which is tied to specific customer information for different loan promotions.

1. A branch manager creates a query that selects a focus group of customers to send an audio message to their contact phone numbers; the message being sent is pertinent to the focus group's current customer status
2. Branch management records the promotion in various languages allowing them to query and communicate with customers based on their preferred language
3. The branch manager schedules the calls to occur at the most effective time(s) of the day for improved results
4. Customers or potential customers acknowledge the calls through the keypad on their phones and indicate they are interested in the products and/or services being promoted and would like more information
5. Customers or potential customers acknowledge the calls through the keypad on their phones and indicate they would like to be connected to a live agent to speak more about the products and/or services promoted during the call
6. The results of the campaigns are available through standard reporting features, giving the branch management the data they need to more accurately plan a more profitable product and services line-up catering to the surrounding demographics