

+Fusion
workflow manager

Improve Efficiency, Reduce Errors and
Enhance the Customer Experience



Fusion Workflow Manager™

Among the many challenges facing financial institutions today, providing a seamless customer experience and ensuring regulatory compliance are at the top of the list – but are often conflicting objectives. Fusion Workflow Manager™ can help you stay in compliance, while helping your staff provide consistent and efficient service to your customers.

Some of the challenges Fusion Workflow Manager can help solve include:

- Siloed and inefficient processes
- Inconsistent customer experience
- Challenges in deepening relationships
- The burden of increasing regulations and compliance
- Inability to incorporate real-time data into business processes
- Dependency on “super users”
- Key resources focused on specific day-to-day processes rather than executing business initiatives
- Drawn out training time for new employees
- Lack of retention of knowledge

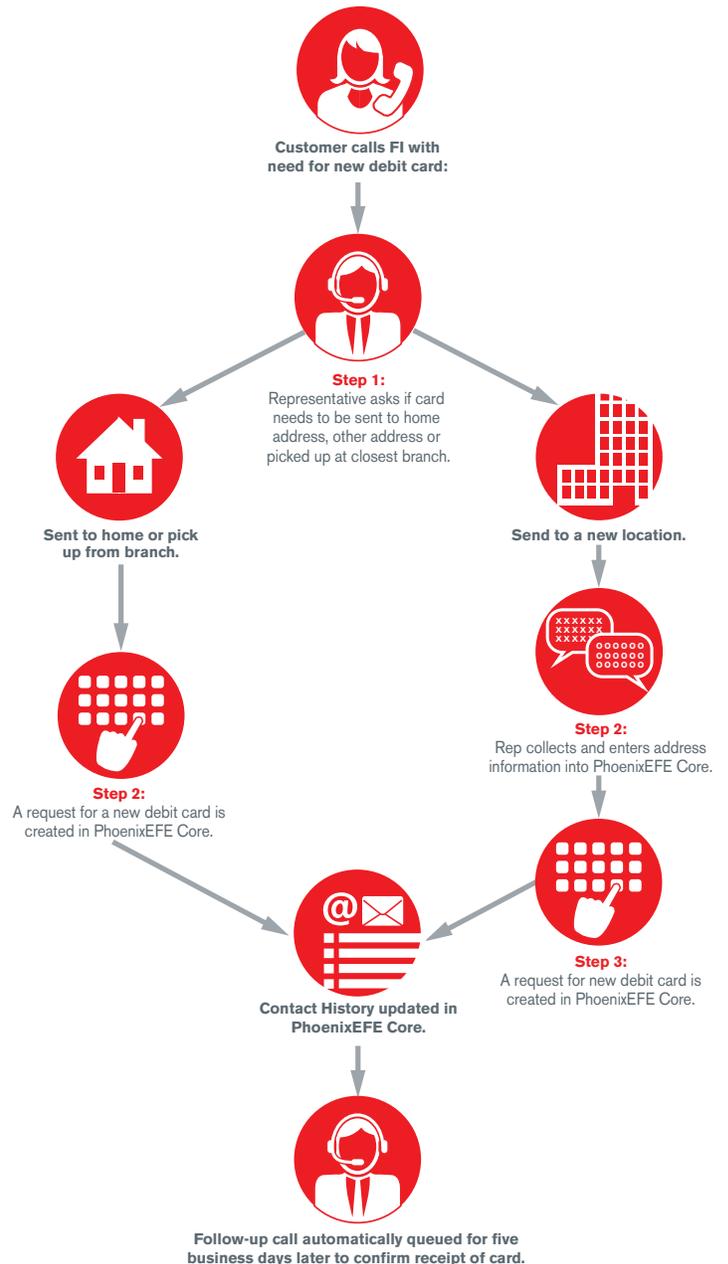
Fusion Workflow Manager is about more than process automation. It can help your financial institution gain a competitive advantage, boost capacity and increase wallet share. Fusion Workflow Manager comes with a library of standard workflows developed by partnering with financial institutions like yours. This incorporates shared best practices and expedites the implementation timeline.

Fusion Workflow Manager Benefits

Break Information Siloes and Increase Efficiency

Example: A lost debit card request is captured at the front line or call center, and needs to be processed by the back office. The customer calls looking for an update.

With Fusion Workflow Manager you will be able to link processes that span multiple departments and create one streamlined, easy-to-use, step-by-step process that can be executed by anyone at your institution. Every workflow can be tracked by anyone using the customer contact history. No more manual steps, lost documents or missed steps. The workflow will not be completed until all defined steps are followed.



Improved and Consistent Customer Experience

Example: Staff at different branches may not always follow documented processes, which may result in inconsistent and frustrating experiences for your customers.

With Fusion Workflow Manager there is no need to distribute any documented processes, as everyone will be using the same pre-defined, standardized and optimized steps. Regardless of which branch or employee the customer is working with, a consistent experience is guaranteed. Workflows can be updated to accommodate new regulations or a change in business strategy, and can be pushed to all employees with assurance that everyone will be following the new required process.

Increase Customer Loyalty

Example: A new customer has just opened a new checking account. Your institution's policy is to cross-sell a debit card, Internet banking, e-statements and bill pay. This should apply to all new checking customers.

Those first 90 days after opening an account are crucial to onboarding new customers with additional products and services. Fusion Workflow Manager helps ensure that no opportunities are missed during this crucial period, by building in steps to cross-sell throughout the new customer account opening process.

Enforced and Tracked Regulatory Compliance

Example: A customer is disputing an electronic transaction and regulations require that provisional credit be given, written notice be sent and subsequent correspondence to happen at specific time intervals.

Today you may be relying on employees to follow the documented process in order to remain in compliance. Simple user mistakes or missed steps can result in an out-of-compliance situation which may result in a financial penalty.

Fusion Workflow Manager ensures employees will have to follow all steps defined in the workflow in order to process specific customer requests governed by regulations. Alerts can be created for required milestones as the date approaches if the task has not yet been completed.

Manage Relationships Proactively

Example: A number of high-balance CDs are due, and your institution has a manual process for retaining that business. Other examples include activating stagnant lines of credit or inactive debit cards.

Fusion Workflow Manager allows you to proactively monitor certain business events and to auto assign work queues related to those events. Assigned workflows enforce your institution's policy, and enables tracking and reporting.

Incorporate Real-Time Data into Key Decision Making Processes

Example: After 30 days, the new checking account customer has not yet signed up for eStatements, debit card or bill pay.

Fusion Workflow Manager is inherent to PhoenixEFE® Core. This enables you to use all the real-time and straight-through processing that is offered with PhoenixEFE Core. It also enables employees to make decisions based on the latest data in order to optimize the client experience. Customer onboarding workflow checks the data real time, ensuring only valid questions are asked of the customer with regard to products, services and account information.

Reduce Dependency on "Super Users" for Handling Key Processes

Example: Mary Jones, your "super user" is out and a loan payoff needs to be done on a specific type of loans with certain conditions.

Oftentimes resources to perform more complex business processes are limited. These processes tend to keep the most qualified and talented employees occupied, leaving a small window of time to launch and execute new business initiatives.

Fusion Workflow Manager enables you to develop reusable and consistent workflows for complex tasks that span multiple departments. This empowers all staff members to perform those complex business processes, freeing up your key resources to execute business initiatives that make best use of their skills and talents.

New Employee Onboarding

Example: A new employee has joined your deposit operations, but will have to complete system training as well as processes, policies and procedures training. She will also need to be shadowed before she can reach her full productivity potential.

Fusion Workflow Manager automatically manages policies, procedures and processes because they are built into the workflows. The resulting benefits include reduced documentation and increased productivity, as new employees will be able to perform their job duties with reduced training time.

How Does Fusion Workflow Manager Work?

Fusion Workflow Manager is inherent to PhoenixEFE Core and leverages PhoenixEFE Core applications. It uses Microsoft® Windows® Workflow Foundation to allow common tasks and processes in PhoenixEFE Core to be defined and automated, ensuring policies and procedures are maintained and consistency is applied each time a business process is initiated.

Setting You Up for Success

Built-In Standard Workflow Library

Fusion Workflow Manager includes a library of pre-defined workflows that allow for minor modifications, including the ability to assign workflows to groups or individual employees, provide specific instructions for each task, modify and assign correspondence templates, and set service-level objectives. Also included are a fixed number of professional services hours to help you get started quickly.

Optional Professional Services

If you desire more intensive assistance, Professional Services can help you set up custom workflows.

Contact your client relationship manager for more information.

Key Benefits

- Improve customer experience by optimizing processes and providing consistency 100% of the time
 - Improve efficiency by using standard workflows to perform many common business functions
 - Reduce training time for staff and reliance on “super users”
 - Reduce user errors
 - Ensure regulatory requirements are met by being built into workflows
 - Ensure controls are enforced reducing the risk of fraud
 - Single repository for processes, procedures and policies for auditors
-

