CSF® Designer Intuition™

FIS Output Solutions

In today's world, your customers want to-the-point, personalized communications, and they don't have time to wait. With CSF® Designer Intuition™ from FIS, you can instantly create and deliver relevant, brand- and regulatory-compliant communications that are uniquely personalized to each customer interaction with your business.

Why Use Intuition?

CSF® Designer Intuition™ from FIS lets you connect with your customers like never before. You can quickly create relevant, compliant correspondence across all of your customer's preferred delivery channels. Whether you want to deliver a customized statement immediately via email, a notification via SMS, or a personalized quote in the mail, Intuition can do it all.

Is Intuition for you?

Designer Intuition empowers all kinds of businesses to provide their customer-facing employees with the flexibility to deliver a personalized experience to their clients, instantly and effectively, without compromising communication accuracy and regulatory compliance—all while keeping production costs under control.

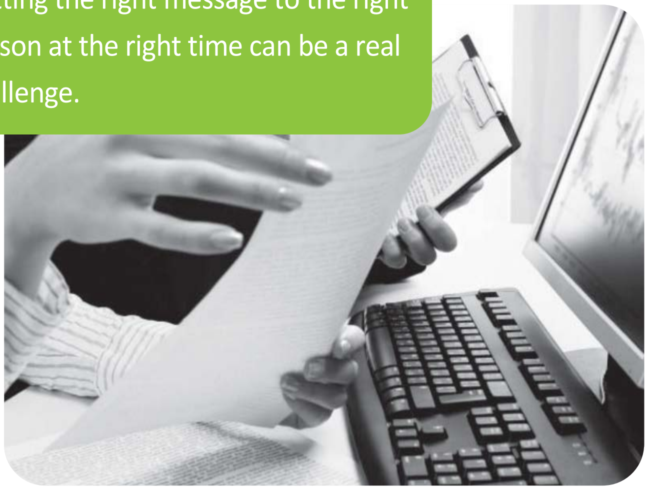
Intuition can be used for:

- Customized, individual- or multiple-customer communications
- Correspondence management
- Loan origination and servicing correspondence
- Dispute and collections letters
- Account opening and customer on-boarding
- Sales and enrollment kits
- Quotes and proposals
- And more...!

Benefits

- Improve your customers' experience, ensuring that they receive correspondence with consistent branding and messaging
- Reduce regulatory risk with consistent correspondence, created from a single, approved source
- Improve productivity and effectiveness of customer service representatives, bankers, and financial advisors
- Ensure industry and corporate compliance for your customer communications
- Reduce the number of document templates to develop and manage
- Reduce development costs and time-to- market for new communications
- Reduce errors associated with manual document fulfillment processes
- Gain additional return on investment from existing business applications
- Consolidate multiple applications into a single enterprise solution—eliminating multiple software licenses and fees

Getting the right message to the right person at the right time can be a real challenge.



Client Communication Challenges

Successfully integrating people, processes, and information is essential to delivering world-class customer communications. Reaching customers with timely, relevant content is more difficult than ever as market expectations evolve and communication channels multiply.

Today, businesses are challenged to accommodate this evolving landscape and are often limited to opposite extremes. At one end, legacy systems produce standard, batch-generated documents with little or no opportunity for user-entered, situation-specific content. On the opposite end are word processing applications, with custom mail merge programming and very limited compliance control, fulfillment automation, or integration to output systems.

A New Solution

With Designer Intuition, your business gets the best of both worlds: the ability to improve the customer experience by instantly generating relevant communications that balance customer-centric content, legal and regulatory compliance, and response times.

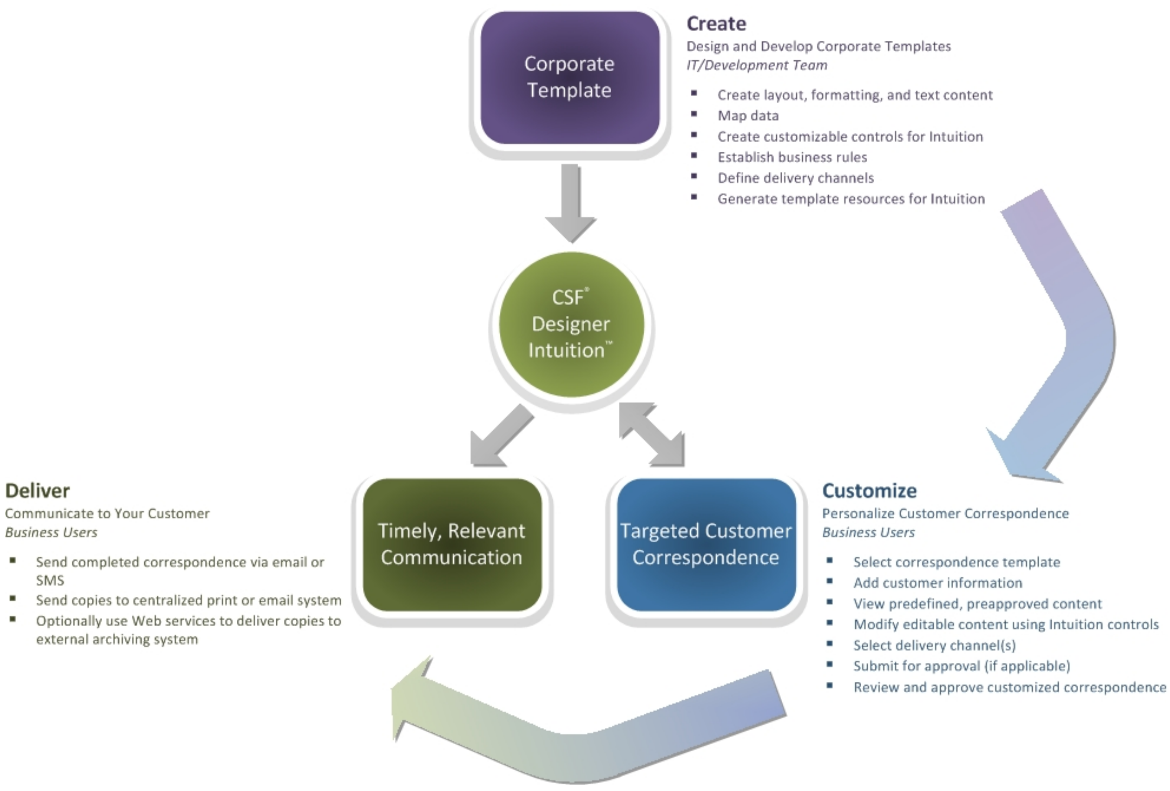
Utilizing a unique, scalable, open architecture, Intuition combines the ease and quickness of Web-form user entry with the familiarity and flexibility of a word processor, along with the omni-channel delivery capabilities of a production output system. Created with user productivity and workflow improvements in mind, Intuition integrates directly to business applications, enabling customer-facing representatives, agents, bankers, and financial advisors to instantly create customer communications that dynamically incorporate customer-specific data with timely, relevant, preapproved, and compliant content.

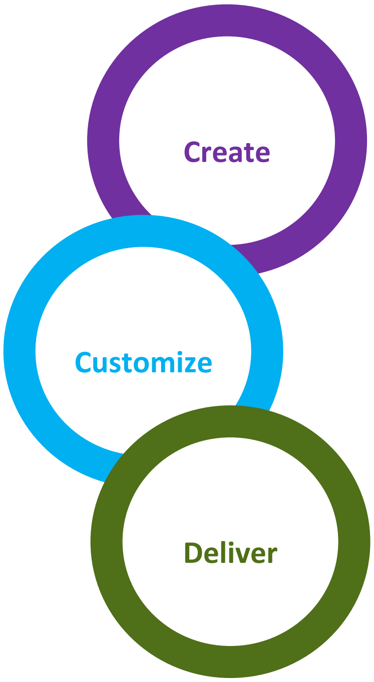
Successfully integrating people, processes, and information is essential to delivering world-class customer communications. Intuition can do just that.

How Do We Do It?

Designer Intuition is part of a complete interactive communications solution, which includes template design, browser-based interactive editing, real-time document generation, and output delivery management. Template designers control what is modified and who can modify it, using advanced formatting such as variable data, colors, images, charts, and targeted messages to clearly convey customer information.

Intuition leverages the production horsepower of CSF® Designer to generate content for multiple customer channels and bridge front-office users with back-office production systems. Intuition templates are instantly generated at the desktop for local print, email, or SMS, or can meet advanced production requirements such as complex document assembly, high-volume print output, inclusion of operational barcodes, and integration with archiving and document management systems.





Elements of Designer Intuition

Create

Corporate templates are developed within the CSF Designer workstation application. Content, business rules, and output profiles are created with standard CSF Designer capabilities, re-using existing CSF Designer content as applicable.

Alternatively, organizations with existing Microsoft® Word files can minimize rework and slash development times by importing the files directly. User permissions and Web controls are assigned to content that can be interactively modified via the Intuition editor. Web controls include freeform text boxes, dropdown lists, check boxes, message selectors, image selectors, and more. Each control definition includes parameters such as display settings, data validation rules, prohibited word lists, and dynamic list population.

Customize

Intuition correspondence templates are displayed and modified using the browser-based Intuition editor. Utilizing modern Web technologies, the Intuition editor displays the customized correspondence with visual prompts indicating which areas can be modified based on the business user's editing permissions. As the Intuition user selects or enters content, the formatting and layout is automatically updated, allowing the user to instantly see the impacts of those selections. Configurable buttons allow the user to submit documents into an optional workflow process, save the correspondence for future retrieval and further modification, or instantly generate a PDF for previewing.

Deliver

Whether your correspondence needs to be delivered via email, SMS, or as a traditional printed document, the Intuition user can select from a customized, pre-defined list of output delivery channels. With a single click, the correspondence is published and delivered directly to the customer, or optionally sent for centralized print or delivery at a later time. The published information can also be sent to an archive system for long-term storage and audit purposes.

Correspondence Management with Designer Intuition

With Designer Intuition, all correspondence is designed, managed, and generated within the CSF Designer product suite. Extending beyond standard, system-generated form letters, Intuition integrates directly with your customer service, business process management (BPM), and output systems, allowing a customer-facing employee, agent, banker, or advisor to review account data, select a correspondence template, modify its content, route it through an approval workflow, save it, distribute it electronically or as a paper document, and store it in an archive system.

Customer Correspondence Management: A Financial Services Example

A banker is working with a high net-worth client on a proposal to consolidate multiple accounts at the bank. The banker views the customer's profile and account data in the bank servicing application and selects the Relationship Pricing Proposal template.

The servicing application automatically invokes the Intuition editor, which immediately displays the multipage proposal, pre-populated with the customer's unique information. Graphs and tables illustrate the current account position. Preapproved proposal language is "locked down" to prevent further editing.

Visual indicators prompt the banker to add or edit content where needed. For example, a free form text block that contains text formatting options such as bolding, italics, bullets, and numbered lists allows the banker to create a personalized opening paragraph. Spell-check catches any user-entered mistakes while an integrated list of prohibited words ensures that no damaging content is included.

The banker uses dropdown Web controls to select proposal options, which in turn automatically select preformatted text options. She uses text boxes with predefined edit patterns to enter pricing information, and changes chart-related data values to immediately change the personalized charts in the proposal.

When the banker realizes that additional information is required to finish the proposal, she can save the in-progress proposal, research the information she needs, and reinitiate the session at a later time. At all times, she is able to view the complete proposal in her browser as it will be presented to the client. As content is entered or modified, document rules are automatically re-evaluated to insert the proper preapproved content, while the formatting is updated with word wrapping and pagination.

Upon completion, the banker clicks a button to generate a PDF version and email it to the client. When the process is complete, the finished proposal is stored in the content management system for audit purposes and future access.

Contact Us

To learn how your organization can improve customer communications, reduce costs, and expedite correspondence creation efforts, contact your client relationship manager, call 800.822.6758, or visit www.fisglobal.com.