

### MARKETING

- Customer Wizard — Data mine and create customer lists based on bank-defined criteria
- Account Wizard — Data mine and create account lists based on bank-defined criteria
- Save bank-defined lists for marketing campaigns
- Pre-Built Marketing Lists identifying opportunities
- User Dashboard of Marketing Campaigns work queue
- Standard Reports and ability to Schedule Reports
- Full campaign management:
  - Automated Dynamic Campaigns
  - Automated On-Boarding
  - Automated Activity, Referral, Pipeline Assignment
  - Broadcast Cross-sell & Service Opportunities at the customer level
  - Automated System List Distribution
  - Seamless Email Marketing to Constant Contact®

### ACTIONLYTICS™



- Ability to append wealth and demographic data powered by WealthEngine™ to consumer customer and prospect records
- Segment customers according to wealth and demographic factors
- Target customers with products and services relevant to their lifestyles
- Access to over 35 data fields such as: net worth, investment assets, real estate value, marital status, and more.

### SMARTPOPS

- Ability to pop customer-specific sales and service messages created through Marketing Campaign Management
- Monitor data fields from multiple applications for unique customer information
- Ability to generate automated Referrals from the pop-up message
- Track all Pops and report on results
- Quick Search into the CRM from any application
- Standard Reports and the ability to Schedule Reports