

**FUSION ANALYTICS**

# **FOCUSED BUSINESS ANALYTICS**





# The Key to Overcoming Today's Challenges in Financial Services Marketing Is Access to Holistic Information about Your Customer Relationships, Behaviors, Propensities and Performance

**In fact, insight-driven marketing was found to be the number one marketing trend for financial institutions in the 2016 State of Financial Marketing by Financial Brand.**

According to the report, new tools and technologies make advanced analytics available for all sized organizations, while digital channels and the desire for personalized offers make the investment in data analytics mandatory for success. Now is the time for marketing to embrace insights about consumers in order to be more relevant to individuals and audiences.



## Now is The Time to Analyze What You Already Know About Your Customers

You must also analyze the role that analytics already play in your marketing program.



Mapping your customer's financial product purchase journey is key to knowing where, when, and how to market to them."

What products and services are most attractive to customers? How can you leverage data to identify customer needs and gain share of wallet? Does your current software—or third party provider—provide you with the tools needed to analyze your customer base thoroughly and predict with accuracy which products should be marketed to them?

"Mapping your customer's financial product purchase journey is key to knowing where, when, and how to market to them. It is therefore important to understand how your customers are thinking and feeling, as well as what they are doing when something triggers the need or desire for financial services." said the 2016 State of Financial Marketing, The Financial Brand.

### The Fusion Analytics Solution

Fusion Analytics from Finastra gathers and aggregates your customers' current relationships, behaviors and lifestyle attributes to help you more clearly see where opportunities for growth and profitability lie. More importantly, Fusion Analytics makes this information actionable by expanding access across the enterprise—from the executive suite to the branch management.

# Fusion Analytics Gives You a Holistic View

**It gives you a holistic view of attribution, acquisition, organic growth, cross-sell ratios, profitability.**



The rate of your success is directly tied to customer satisfaction and retention.”

It also gives you a holistic view other key relationship performance indicators amassed by individuals, households, employee, or by branch and region so that your leadership can make logical and strategic decisions:

- Aggregates and delivers information you need to positively affect retention and cross-sell
- Helps executives better understand and track opportunities for market expansion
- Provides a basis for where the best opportunities for deposit and loan acquisition lie
- Identifies performance objectives by branch and region
- Gives a view of which products are performing and underperforming

### **Capture The Entire Household**

The rate of your success is directly tied to customer satisfaction and retention. Having a grasp of your entire relationship with the customer ensures that you are anticipating their needs and beating the competition before they steal your customers. Fusion Analytics directly impacts strengthening relationships by providing tools for you to understand your customers, anticipate their needs, and manage channel interactions and preferences with key performance metrics, sophisticated and actionable segmentation, purchase propensities, and share of wallet.

Fusion Analytics pulls data from many account and customer information silos to create a comprehensive and clear picture of each person in the entire household, allowing a true 360 degree view of checking and savings, loans, credit cards, mortgages—all the products and services you offer. With this information, financial institutions can proactively and effectively target the cross-sell to individuals under one roof to gain share of wallet.

### **Use Your Marketing Data For Decision Making**

With Fusion Analytics, your customer data is compiled in one area from multiple systems to give you depth of knowledge in identifying and approaching your market for specific marketing campaigns, profitability, and strategic planning. Whether it's the president of the financial institution or a marketing team looking to promote a new product, Fusion Analytics has the data needed to give a comprehensive and detailed view.

# Dynamic Business Analytics at Your Fingertips



Finastra data centers are held to the strictest security compliance standards and hold all mandated audit certifications.”

**SaaS Based**—Access directly from any Internet browser, no special hardware or software needed, and future releases are included and seamless.

**Modern, Easy Navigation**—Search and gain insights quickly in a user-friendly, intuitive environment.

**Integration**—Pull data into one centralized location from your core system and third party vendors (credit cards, insurance, trusts, investments, etc.).

**Daily Data Updates**—Refresh core data on a daily basis to ensure your information is the most current.

**Performance Indicators**—Easily access and graphically view information with a click of the mouse.

**Reporting**—Standard and advanced report outputs controlled by variables of your choosing.

**Data Analysis**—Conduct ad-hoc research on current and historical time periods, aggregated by the variables of your choice. Advanced capabilities include trending, comparative assessments and cross-data analyses.

**Segmentation**—Group like customers together to get a better understanding of how behaviors and relationships affect future purchasing.

**Campaign and Channel Management**—Research, contact and measure targeted one-off or serialized campaigns across multiple channels. Refine your delivery channel strategy based on response feedback from campaigns in order to refine future campaigns and customer channel preferences.

**Compliant**—Finastra data centers are held to the strictest security compliance standards and hold all mandated audit certifications.

**Support Services**—Available to all Finastra clients.



## About Finastra

Finastra unlocks the potential of people and businesses in finance, creating a platform for open innovation. Formed in 2017 by the combination of Misys and D+H, we provide the broadest portfolio of financial services software in the world today—spanning retail banking, transaction banking, lending, and treasury and capital markets. Our solutions enable customers to deploy mission critical technology on premises or in the cloud. Our scale and geographical reach means that we can serve customers effectively, regardless of their size or geographic location—from global financial institutions, to community banks and credit unions.

Through our open, secure and reliable solutions, customers are empowered to accelerate growth, optimize cost, mitigate risk and continually evolve to meet the changing needs of their customers. 90 of the world's top 100 banks use Finastra technology.

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