

8 WAYS TO IMPROVE ACCOUNT HOLDER SERVICE

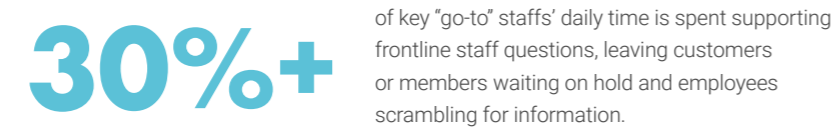
Providing exceptional service in your bank or credit union helps attract and retain customers or members. As technology becomes more robust and consumer buying habits shift, financial institutions must constantly be looking for areas of innovation and ways to meet the demands of a 21st-century consumer.

Technology is a cornerstone in the account holder experience. Finastra has solutions that meet any need, so you and your team can focus on your customers or members. Contact us today to learn how we can help you.

1. EMPOWER YOUR EMPLOYEES

Ensure that every employee has:

- Accurate, up-to-date and consistent information
- Immediate answers to their questions
- An easy way to search for information

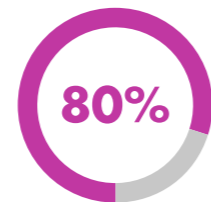


2. ALLOW SELF-SERVICING

Provide self-service support content across web, mobile, and online banking platforms.



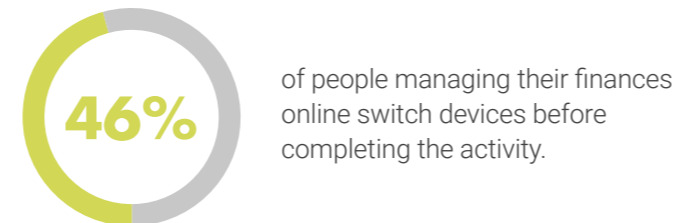
of consumers have made a purchase using a mobile device in the last six months.¹



of consumers look up product information, reviews and prices on their smart phones while shopping in a physical store.¹

3. STAY CONSISTENT ACROSS ALL TOUCH POINTS

Provide consistent information for best account holder service.



of people managing their finances online switch devices before completing the activity.

4. EDUCATE ACCOUNT HOLDERS ON FINANCIAL LITERACY

Financial education programs can create goodwill at the local level and strengthen relationships with consumers and community partners.

“ (Financial institutions) can receive Community Reinvestment Act credit for providing financial education to low and moderate-income individuals.”

Federal Reserve Bank of San Francisco

5. EMBRACE FINANCIAL TECHNOLOGY

- Explore advances in mobile payment options
- Embrace artificial intelligence
- Integrate systems and convert old data to new formats
- Take advantage of consumer data and social media

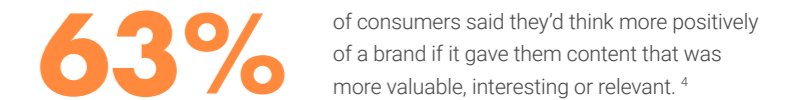
6. BECOME AN ADVISOR, NOT JUST A LENDER, FOR SMALL BUSINESSES

543,000 Number of new businesses started each month²

30.2 Million Number of small businesses in the U.S.³

7. SEGMENT YOUR CLIENT BASE AND CREATE PERSONALIZED EXPERIENCES

Stay competitive and build account holder trust by personalizing and segmenting messaging and services.



8. TEST AND THEN TEST AGAIN

Test things such as frequency, messaging and channel of communication to evaluate trends, successes, and challenges.

Account Holder Satisfaction by Financial Institution

