

AN INSIGHTFUL VIEW OF CITI CLIENTS



“ Attivio’s unique combination of text analytics and structured data analysis has many applications for Citi.

- Director, Internet Strategy,
Citi Private Bank

THE CUSTOMER

Citi Private Bank provides wealth management strategies for thousands of high net worth individuals. Each client is assigned a dedicated Private Banker, whose responsibility is to gain a deeper understanding of the client’s goals, objectives, and risk tolerance, and develop a compelling wealth management strategy to attain their goals.

THE CHALLENGE

In order for the Private Bankers to be successful, they need to quickly access a complete, unified view of their clients. Information relevant to building an insightful profile of a Citi account lived in twelve different systems across the enterprise. Citi’s existing open-source search tool could only search each source in succession. The inability to gain a quick, unified view of the customer severely limited Citi’s ability to provide superior customer service and effectively cross-sell and upsell.

THE SOLUTION

The Attivio Platform was the only offering on the market that could meet Citi’s demanding requirements to create a unified, comprehensive view of their clients. Attivio’s ability to present customer retention and upsell offers provided thousands of Citi Private Bankers around the world with a comprehensive view of their clients via an iPad app. Bankers could reduce the time spent on client inquiries and devote more time to consultations, increasing customer satisfaction and identifying new revenue opportunities that expanded Citi Private Bank’s revenue share.

THE OUTCOME

In just three short months, Attivio delivered a complete solution that helped Citi realize a higher, earlier return on their investment by:

- Rapidly ingesting all relevant customer information regardless of the source, including account information, demographic data, product information, and research content,
- Enriching the information through entity correlation between products, research, and clients
- Delivering critical customer insights in a complex operating environment, with customized access controls that meet national security standards.