

Guarantee Customer Delight

Holistic account management increases customer satisfaction and drives incremental sales



Sales and customer service executives fight a constant battle to increase sales without significant increases in headcount. Most are looking for transformational improvements in sales productivity, not incremental gains.

Attivio clients are experiencing market-disrupting gains in sales productivity and client satisfaction by expanding their existing view of the client – by adding and analyzing new and emerging data on client interactions.

Empower your Customer-Facing Teams

Are your clients at risk of defection? Clients struggle with multiple points of contact, receiving a disjointed experience that damages engagement and saps loyalty - leading to lower revenue.

Are your client-facing teams working hard or working smart? Without a complete view of the client, your account executives miss opportunities to leverage a client's interests into valuable up-sells. Too much time researching means too little time selling.

Gain Complete Insight into the Customer

Are you confident you know everything about each client? Only 20% of a client's business activity is captured in transactional data. Like an iceberg, there's much that's currently unseen, creating danger that your client may not receive your best offerings or be attracted by a competitor.

THE ATTIVIO DIFFERENCE

- Provide a single-point-of-contact that strengthens loyalty**

Clients and your account executives have one experience that combines structured and unstructured data into an engaging, actionable, 360°view.
- Save time, propel insight for client-facing teams**

Promote a proactive, not reactive, posture for each account, guiding them from decision through transaction - surfacing opportunities to cross-/up-sell and guarantee retention.
- Bring everything about the client into focus**

Capture and analyze every interaction and transaction, improving client-advisor communications and satisfaction.

With a real 360° view of their client (one that incorporates every source), your client-facing teams will deliver increased share of wallet and improved customer retention –using client-specific insight.

With a ‘single construct of the client’, easily presented on a ‘single pane of glass’, account executives spend less time researching what to sell, and more time on selling what clients are seeking.

With a comprehensive, personalized view of their clients, account executives move to a proactive stance – bringing opportunities that improve customer satisfaction, reduce account switching, and turbo-charge sales performance.

A PROVEN SOLUTION



When Citigroup implemented a platform to support its network of private bankers serving over 20,000 wealth management customers, it chose Attivio to collect and distribute news and research, as well as deliver customer account data to a comprehensive customer-focused dashboard.

**UBS**

Attivio is the core discovery and content provisioning engine behind UBS's award-winning Neo platform. Serving institutional banking clients with the research, advisory, market, and transactional information they need to convert investment ideas into timely, executed trades, Attivio helped propel UBS to share-of-trading leadership in FX in its first year of operation.

ABOUT ATTIVIO

Attivio makes information meaningful, accessible, and actionable in ways that were never before possible. Our Customer Retention and Upsell solution enriches and unifies information from any source or format, exposing hidden insights, kick-starting productivity and motivating increased loyalty and revenue.

SEE WHAT ATTIVIO CAN DO FOR YOU

To learn more about how Attivio helps financial services firms put their data to work, please visit us online at www.attivio.com.