

Fincentric Leadbuilder

turn daily customer interactions into revenue-generating opportunities

Fincentric Leadbuilder is a bank lead generation software tool that works with your existing systems to improve the profitability of your existing customers. Bridging the divide between marketing teams and sales and service representatives, Fincentric Leadbuilder gives your employees the tools they need to present targeted, relevant offers to existing customers during daily customer interactions. Ultimately, the solution will help you increase customer share of wallet, grow fee income and create more profitable relationships with your customers.

increasing marketing effectiveness

Studies show that your most valuable customers are those who buy four or more of your products—delivering 120% profitability. However, these customers typically comprise just 10% of your customer base. The majority of your customers (60%) are likely to have only one or two products each—delivering a significantly smaller or even negative profitability margin¹.

Fincentric Leadbuilder turns these statistics around by providing the tools you need to effectively sell products to your existing customer base, turning daily customer interactions into revenue-generating marketing opportunities.

Compared to direct mail campaigns which typically deliver a response rate of just two percent, Leadbuilder can provide a dramatic increase in responses, up to 8-9%.

Fincentric Leadbuilder increases lead referral volume and immediately passes customer responses to lead management systems, ensuring that no sales opportunities are lost. It enables you to reach customers who have asked not to be called or who don't read traditional marketing literature. It extends the effectiveness of your outbound marketing campaigns, integrating them into the system and ensuring that representatives are well versed on the strategies and messaging behind your marketing endeavors.

delivering the right offer at the right time

Fincentric Leadbuilder leverages marketing campaigns by extending their reach to the point of face-to-face customer interactions. Every time a customer contacts your bank, our specialized software will automatically search your marketing campaign file and present the best offer for that specific customer. Representatives will see a targeted, customized message pop up onscreen which they can present to the customer in a casual, comfortable manner as they proceed with the daily transaction.

The system strategically stacks offers so that multiple sales opportunities are effectively offered and managed. Representatives are presented with offers that are current, a good fit, and have not been purchased, applied for or declined by that particular customer before. All offers presented are then synchronized with the core banking system to prevent representatives from repeating previous offers or presenting already-purchased products and services.



¹ Developing & Implementing World Class Sales & Service Performance. Financial Selling Systems, Inc. 2006.

being frontline friendly

Fincentric Leadbuilder presents offers instantly and automatically. Frontline service representatives can concentrate on serving the customer while the offer automatically appears as a banner on their computer screen. All offers are automatically designed for the current customer. The system works with the industry-standard Microsoft technology your tellers are already trained in and familiar with, reducing the learning curve.

automating lead generation from the frontline to the sales desk

Fincentric Leadbuilder quickly captures customer responses with "one-click" creation of a qualified lead referral. There's no need to manually input customer information, and leads are automatically routed to the appropriate department for follow-up. The system also provides the ability to quickly record the customer's alternate phone number and best time to call, allowing for speedy follow-up of the lead. All lead results are passed back to the service representatives who generated them, closing the loop and reinforcing the sales culture.

generating leads that are easier to close

Fincentric Leadbuilder delivers warm, consistent and qualified leads to sales representatives, reducing the time they spend on solicitation, cold calling and the pursuit of stale or unqualified prospects. Sales representatives capitalize on the qualified leads from Fincentric Leadbuilder with close rates of 20% to 50%. Information about the customer and their response to the offer is automatically populated into lead management systems, maximizing the timeliness and effectiveness of follow-up sales calls.

measuring the success of your marketing & sales campaigns

Marketing analysts are able to use Fincentric Leadbuilder to better understand the purchasing patterns of the customers they market to. The system provides a service portal that enables marketing personnel to set up and manage customer offers and associate those offers with

customer lists. This enables greater control of leads by focusing resources and marketing efforts on the activities that are proven to maximize customer awareness, interest and purchasing. Understanding the status of leads generated from the frontline and measuring the qualification process allows marketers to adjust campaigns where necessary to increase their effectiveness.

achieving fast return on your investment

By making it easy to present targeted offers to your current customers, Fincentric Leadbuilder starts delivering incremental revenue on day one, delivering a quick return on your investment. It provides an exponential increase in the number of leads generated at branches and call centers, significantly driving revenue and enabling you to pay off the system in months, not years. What's more, Fincentric Leadbuilder leverages existing Marketing Customer Information File (MCIF) and lead management systems, maximizing your complete technology investment.

easily integrating into your current environment

Leadbuilder runs seamlessly within your current IT architecture and operates easily with both outsourced and in-house banking platforms. Marketing campaign data can be imported from existing MCIF systems or other propensity-to-buy systems.

about Fincentric

Fincentric Corporation provides technology and services solutions that help financial institutions automate key business processes to drive operational efficiencies, increase revenues and improve customer satisfaction. Our teams and our high-performance technologies have been supporting well over 160 financial institutions on 5 continents for over 22 years. For more information about Fincentric, please visit www.fincentric.com.

next steps

For more information or to schedule a one-on-one consultation on how Fincentric Leadbuilder can support your marketing strategy, contact us at 800.667.1185 or visit www.fincentric.com/leadbuilder



solutions to brighten your banking future