COMMLINK™

Keep front-line and call center employees informed by giving them access to customer communications. CommLink is a web-based application that allows front-line employees to see a copy of any specific email or letter sent to a customer via the Marquis platforms. This becomes especially valuable when the financial institution is leveraging marketing automation with messages being triggered daily.

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ASSEMBLY

- To activate CommLink, Marquis places a unique identifier on email and direct mail pieces. This unique code is the key to retrieving specific communication by customer-facing staff.

- To view an email or letter, the employee simply opens the CommLink application and types in the customer's email or mailing address. They will see the list of what has been sent and can click on the specific communication.

- A complete library of emails and letters is stored for access by front-line staff. Communications can be retrieved at the FI or customer level.

- Very little training is needed; however, Marquis does provide a brief training video.

ANALYSIS

- CommLink helps employees to be better prepared to answer customer questions.

- CommLink operates in real time. If an email was sent by Marquis, it will be visible.

- This tool is especially valuable where there is a large branch network across multiple communities or within call centers where timely communication is a requirement.

ACTION

- The actual email will open, with merge fields included. For letters, a generic PDF will open.

- The front-line staff and call center employees can see offers that were sent by email or letter and confirm details.

- The staff can also use CommLink to assist in the following ways:

  - Resend an email to the original recipient.

  - Confirm that the email did come from the institution, alleviating "phishing" concerns.

  - Assist with the "opt out" process without blocking account notifications.

OUR MISSION. To make it easier for you to assemble, organize and translate complex data, behaviors and needs into actionable solutions.

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MARQUIS

Commonly asked questions about COMM**LINK**™

What is CommLink?
CommLink (aka Communications Link) is a web-based application that allows front-line employees to see a copy of any specific email, letter or postcard sent to an individual customer via the Marquis or DocuMatix platform.

Why use it?
CommLink helps employees to be more informed regarding what has been communicated from the institution. This tool eliminates the front-line dilemma of hearing, "I received this email last week and I have a question about it." It does not create a positive interaction when the employee's response is, "What email?"

Who uses it?
CommLink is designed for anyone who wants to equip the front-line with the ability to see every communication to their customers. CommLink helps employees to be better prepared to answer questions. No employee ever wants to appear unknowledgeable. This tool is especially valuable when there is a large branch network across multiple communities.

How does it work?
The front-line employee simply opens the CommLink application and types in the visitor's (or caller's) information.

To search for emails, the email address or Security Key (or Email Key) is entered. They will see the list of what has been sent and can click on the specific communication. The actual email version the customer received will be shown, with merge fields included.

To search for letters or postcards, the front-line employee types in the name and mailing address. They will see the list of what has been sent and can click on the specific communication. A generic PDF version will be shown.

How often is it updated?
CommLink operates in real time. If an email was sent, it will be visible. Letters and postcards will be visible the next day.

What about my stand-alone campaigns that are mailed?
Stand-alone campaigns can be searched within CommLink.

If I "opt out" a customer is it all or nothing?
A financial institution can build categories called Subscriber Preferences so the customer can opt out of some emails without opting of all (e.g., marketing or promotions but still receive educational or community updates). If you are using Subscriber Preferences, the categories you have defined will be available to control instead of an all or nothing "opt out".

What software is required?
No new software is needed. Marquis simply sets up users with a login ID/Password that allows them to access CommLink.

Is there setup involved?
Marquis enables CommLink and grants access to the institution. The institution then sets up each user with a unique ID/Password.

Is training needed?
The advantage of CommLink is that it is easy to use. There is very little training required; however, Marquis does provide a brief training video to answer the basic questions and show users how to access specific communications, resend an original email or assist with the "opt out" process.

How many users are allowed?
Each institution can have an unlimited number of users.

If my decision trees are set up in ExecuTrax's TriggerPro vs. DOD, can I still see the triggered emails and letters?
Yes.