

Engagement Bundles



Connect with your customers real-time with chat and support solutions, while providing added cross-sell, security, reporting and integration features for administrative staff and agents.

Supercharge your engagement strategy with chat, desktop sharing and secure support capabilities. You can now enable your customers to chat with your care team online as well as on mobile, and empower them to search securely for answers to frequently asked questions. To make it easy for you to provide the best experiences to your customers, we've combined solutions that complement each other into bundles that kick-start engagement.

There are four bundle options: Chat, DesktopShare, Premium Engagement and Web Engagement.

1. Chat Bundle

Connect with your customers online or on mobile and grow revenue through relevant cross-sell, while providing security, reporting and integration features for your staff.

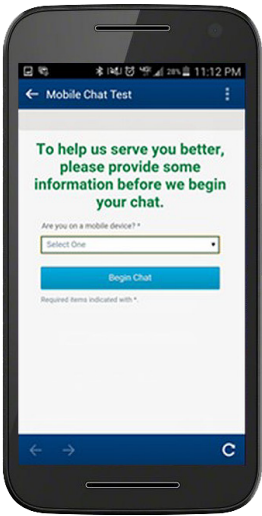
Features

- Proactive Chat - Enable end users to access a live chat application to connect with customer support operators through Online Banking.
- Mobile Chat for Mobile Web and Mobile App - Enable end users to access live chat with customer support operators through their Mobile Banking App and Mobile Web.
- Premier Secure Chat - Chat functionality for online banking with key security features such as:
 - o Survey Logic – Develop pre-chat questions that you can hide or display for efficient support.
 - o PCI Secure Form Widget – Create a secure form for end users to safely share sensitive, personal identifying information.
 - o Block Credit Card Patterns – Present Credit card patterns with symbols you choose.
 - o Data masking – Define sensitive data patterns and mask them.
 - o Data integration – Export chat transcripts in XML and text formats. Import to CRM.
 - o Security Reports – Log chronological access to the chat platform.

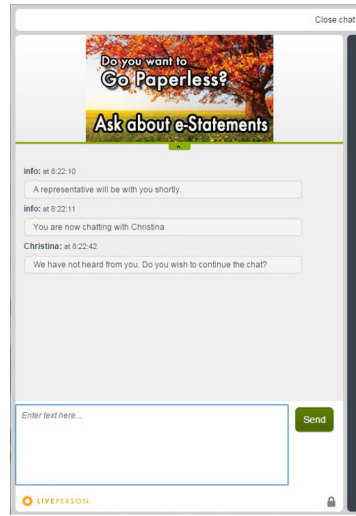
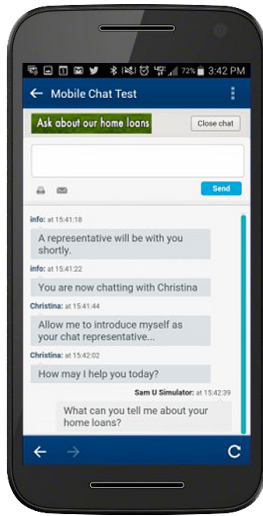
When you interact with your customers at their time of need they are more satisfied and have more products and services with you.

Benefits:

- Increase customer engagement
- Provide targeted support
- Keep personal information safe



Mobile Chat



Proactive Chat
(Online Banking only)

2. DesktopShare Bundle

Enable your customers to share their desktop screen with customer support, while empowering them with self-service information resources as well as online and mobile secure messaging capabilities.

Features

- DesktopShare – A web-based customer service tool integrated with Online Banking that enables end users to request a desktop sharing session to share their screen with customer support operators.
 - o Share full desktop – Customer support operator and end user can share the exact same desktop.
 - o Unique Pointer – Support operator can point to specific areas on a page.
 - o Joint Form Fill – Support operator can see what the end user types into form fields
 - o Log Reports – Log and store desktop sharing sessions
 - o New Window Support – Accommodates web pages that open new windows.
 - o Chat or Email to initiate link sharing
- Secure Support (Email) – A secure, private message platform for end users whose questions have not been adequately addressed through self-service tools.
 - o Send and receive inquiries and responses using 128-bit Secure Socket Layer encryption technology.
 - o Generate reports to measure customer support effectiveness.
 - o Spell-check and format chat responses.

Benefits:

- Solve customer problems more quickly
- Initiate sharing through chat or through email
- Empower customers with self-service resources

- o Route inquiries to appropriate customer support operators based on skill set.

- Mobile Secure Support - Provide Secure Support through your Mobile Banking App.

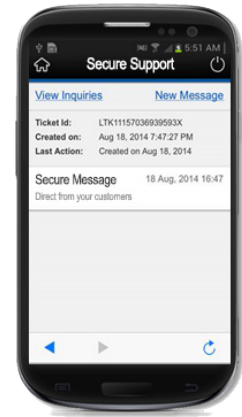
- Users can start an email conversation on a mobile device or desktop and pick it up later on any device.

- Knowledgebase - An online database of frequently asked questions that integrates with Secure Support

- o Populate content into an editable library accessible by support operators using Secure Support or Secure Chat

- o Receive end user inquiries and provide responses by matching content to the inquiry

- o Enable end users to download product brochures, manuals and sales presentations



Mobile Secure Support

3. Premium Engagement Bundle

Grow revenue and create value for your institution through exceptional, real-time support experiences for your customers online and on mobile with a combined Chat and DesktopShare Premium Engagement Bundle.

Includes:

- Chat Bundle
- DesktopShare Bundle

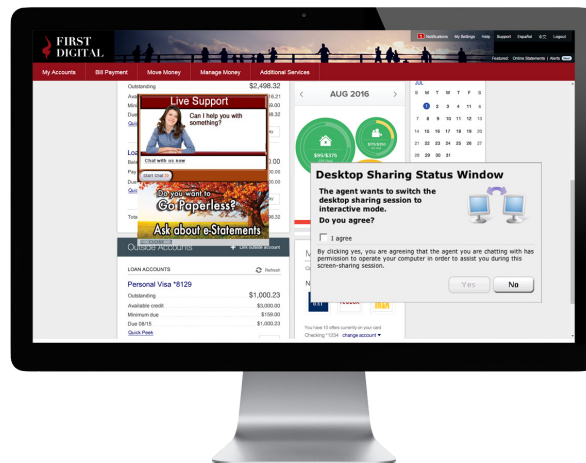
4. Web Engagement Bundle

Deliver exceptional customer care and cross-sell relevant offers through Online Banking with secure messaging, desktop sharing and support solutions.

Includes:

- Premier Secure Chat
- Proactive Chat
- DesktopShare
- Secure Support Email
- KnowledgeBase

Note: No mobile products are included with the Web Engagement Bundle.



Proactive Chat and DesktopShare

Banks and credit unions turn to Digital Insight for innovative online and mobile banking that drives growth. For nearly 20 years, our leading solutions have helped financial institutions engage more meaningfully and more profitably.

