

integrated



minds



solutions



Navigator

...enabling visionary MRM performance

- ▶ Displays a 360° view of the client in the Navigator Client Workspace to ensure customer service representatives (CSRs) have all the information they need
- ▶ Provides launching points with direct access to operational functions to improve the efficiency of front-line processes
- ▶ Enables one-click drill through for easy access to transactional and member details
- ▶ Presents CSRs with dialog topics to assist with the notion of 'next best offer', facilitating cross-selling, up-selling as well as advising on topics of interest
- ▶ Launches applications and websites as a result of dialog topics, making it easy to perform member requested transactions
- ▶ Tracks all customer contact and automates required follow-up by creating a diary of pending tasks
- ▶ Tracks effectiveness of Dialog Topics to help understand what works and to refine offers

Designed with clubs for clubs, Navigator is a multi-faceted Member Relationship Management (MRM) tool which empowers your customer service representatives (CSRs). With Navigator your club will enjoy expanded services and sales, improved member retention and strengthened member relationships.

Empowering Your Customer Service Representatives

The Navigator Client Workspace (NCW) gives your CSRs a 360° view of each individual client, allowing them to deliver consistent and relevant customer service. The member profile includes information from Lifetime Value, Dialog Topics, Promotions, contact activity and all past transactions from all business lines. From the NCW your staff can easily initiate transactions, drill-through to review past transactions and review member details and relevant promotions. Navigator lets you track contact with members, including information and quote requests, and sales leads. It also lets you define pre- and post-scripts with customized action buttons that display helpful information to facilitate cross-selling and streamline navigation to related functions.

Customized Views

Navigator Client Workspace offers customizable views of a member profile that includes support for all three critical areas of the relationship:

- *Historical*: all previous transactions incorporating both AXIS and third-party transactions are optimally sorted with drill through capabilities to quickly and easily view details of any past transaction.
- *Current*: this includes member status, contact information, Lifetime Value, membership expiration date, balance owing and Affinity Dollars.
- *Future*: Navigator uses analytical functionality in tandem with a member's historical and current information to provide CSRs with relevant dialog cues. These include targeted promotions and dialog topics for potential sales opportunities or helpful reminders to reinforce AAA/CAA membership value.

With the click of a button, NCW's customer-centric view can be toggled between details for a specific individual and the entire household.

Navigation Actions

Navigator encapsulates the entire user environment into one central location by letting you define 'Nav Actions' that link to an AXIS function, launch a third-party application or link to a webpage or Intranet site. These actions are then linked into the Client Workspace allowing CSRs to quickly and easily launch necessary operational functions. For example, you could create a Nav Action that launches the Membership payment screen to perform a pay-as-is transaction whenever you click on the member's balance owing.

Intelligent Dialogs

Navigator was designed to assist clubs in providing their members with timely and relevant information. In support of this fundamental principle, Dialog Topics presented to CSRs are constantly adapting based on the latest information about the member, the skills of the CSR and the rules supplied by the club. Dialog Topics can also be associated with 'Nav Actions'. For example, during a transaction a CSR could question whether a member wants to add an Associate. The member's response (Yes or No) can launch an operational function based on the response and its pre-defined 'Nav Action'.

Scripting Possibilities

Scripting ensures that CSRs have the intimate knowledge and tools required to successfully cross-sell products and services. Navigator lets you define pre- and post-scripts that display helpful information and related opportunities that go together. You can also use scripts to highlight internal procedures and business policies and practices. Scripting also provides customized Nav Actions to let your staff navigate to functions that are appropriate for the member and their needs.

Contact Management

While some systems only keep track of customer *transactions*, Navigator goes beyond this basic step by providing CSRs with the ability to track non-transactional *interactions* with members. This important data is captured quickly and intuitively to ensure that there are no delays in the process which might deter its use. For requests requiring a follow-up, a department and teller will be assigned and a diary task will automatically be added.

Consistent Service for All Customers

Navigator Client Workspace provides a 360° view of the client and comprehensive functionality to ensure your CSRs enjoy a consistent approach to managing the customer relationship.

Open Design

Navigator is browser-based and capable of running by itself without the AXIS client. While the non-AXIS version is primarily offered for inquiry purposes, it is extremely appropriate for users who typically do not use AXIS.