



**Interactive Intelligence Inc.®**  
Powering the World of Business Interaction



FOR BANKING INSTITUTIONS THAT WANT MORE THAN JUST DIAL TONE FROM THEIR CURRENT PBX, BANKING INTERACTION CENTER IS THE TOTAL IP TELEPHONY SOLUTION DESIGNED TO IMPROVE BUSINESS COMMUNICATIONS WITH YOUR CUSTOMER BASE. UNLIKE THE PROPRIETARY PHONE SYSTEMS FROM THE OTHER PBX VENDORS, BANKING INTERACTION CENTER IS AN OPEN SYSTEM THAT DELIVERS FOR ALL BUSINESS COMMUNICATION REQUIREMENTS.

## FEATURES OVERVIEW

# Total Business Communications for Banks

**BANKING INTERACTION CENTER.** *The Complete IP Business Communications Solution for Financial Institutions.*

“ This system not only meets our enterprise telephony needs, it also provides us with a way to consolidate transaction processing and cataloging for interactions such as e-mails and Web chats.”

— Lee Bostrom  
Chief Information Officer  
Glenview State Bank  
[www.gsb.com](http://www.gsb.com)

## BANKING INTERACTION CENTER... seamless business continuity

The Banking Interaction Center’s single platform and bundled application suite is made to optimize business continuity throughout your banking organization: Integrate contact center business objectives with enterprise goals. Connect branches, departments and remote employees to elevate collaboration. Offer online and phone-based banking services that fit your customers’ schedules, along with the kind of efficient, attentive personal service that keeps customers around for the long-term.

And do it all with total scalability and disaster recovery assurance should your bank ever need it.

With its server-driven, open platform architecture, the Banking Interaction Center gives distributed financial institutions a choice of voice over IP (VoIP) via SIP networks or remote server capability to scale to 4,000 users and 800 remote workers across multiple sites. Fail-over capabilities and the automated site-to-site mirroring of servers also let your bank meet regulatory requirements and overcome disruptions by keeping communications in tact during an outage at any location—ensuring that vital business processes and service remain equally in tact at all times.

## Key benefits

In one comprehensive solution, the Banking Interaction Center system and its pre-integrated features empower any bank to:

- Provide superior customer service** and banking services, that potential and existing customers take note of, and that lead to successful cross-selling and up-selling
- Increase productivity** from business users, branch employees, contact center agents and remote and mobile workers
- Improve communications control** with a unified communications infrastructure, global application deployment across dispersed banking operations, and central administration at HQ
- Reduce total cost of ownership** over proprietary communications hardware, including phones and associated equipment

## The only communications solution your bank needs

Developed for voice as well as data, the Banking Interaction Center equips banks to handle multimedia interactions including calls and IP calls, voicemails, e-mails, faxes and Web contacts. Cost-effectively integrate customer databases along with CRM, data processor, workforce management and desktop business applications, and your bank becomes a true full-service financial institution.



## For Customer Service Attract/ Retain Customers with Superior Service

**Offer multi-channel options** for phone, fax, e-mail, Web and wireless

### 24x7 self-service

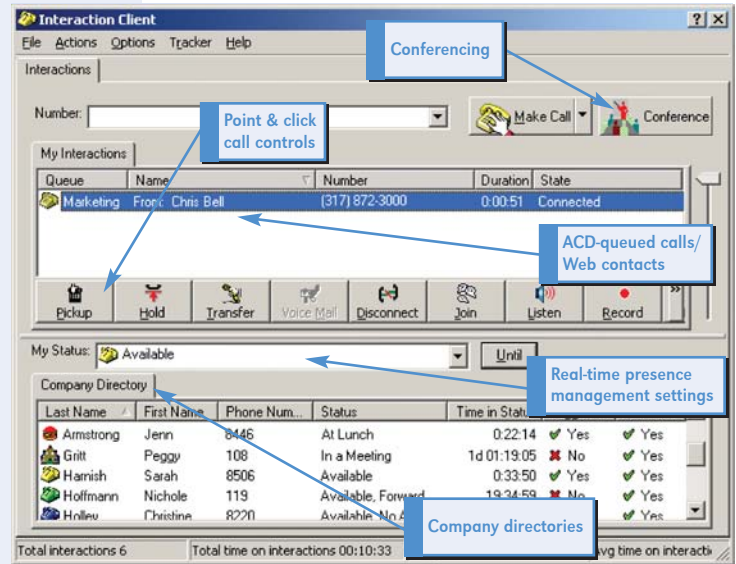
- Interactive voice response (IVR) that lets you create and customize bank by phone and other self-service menus for your contact center as well as branch locations
- Collaborative Web page browsing, including text chat, Web callback and Web page push
- Online forms completion for loan applications and other documents
- Speech-enabled services
- Skills-based and priority routing of customer calls
- Identify caller by name based on Account ID entry
- Route calls to appropriate groups (such as Collections) based on customer account status
- In-queue announcements to up-sell and cross-sell products

### Proactive customer contact

using e-mail, the Web, and outbound call campaigns

**Post-call satisfaction surveys** to invite customer feedback in automated format

**Analysis of customer information** including the history of each customer's interactions



**"Employee productivity needs to improve."**  
The Banking Interaction Center's desktop communications manager puts queued interactions, call controls, presence management status controls and enterprise directories in one place for immediate productivity gains.

## For Employees Increase Productivity

**Windows®-based desktop communications manager** interface that transforms any phone device into a corporate extension on the PC

- Point & click controls to manage calls and Web contacts
- Conferencing up to 24 parties
- Corporate directories and speed dials for individuals and workgroups
- Call and message waiting
- Support Caller ID and integrate reverse whitepages
- Paging and alphanumeric pager support
- Operator target for "0" option out of user's voicemail
- Remote login for remote agents and mobile employees
- Supported in Web browser and on Microsoft® Windows® 2000
- User, Workgroups, Queues, Reports, Stations, and Lines "pages" configurable at the end-user level
- Caller prompting, such as prompts for a customer's ID or account number

**Real-time presence management** controlled from the desktop communications manager with status settings for Available, At Lunch, In a Meeting, Out of the Office, etc.

- Set anticipated return times with "Until" fields for date (day) and time of day
- "Camp" to monitor when unavailable users become available

### Available Forward and Follow-Me

- Forward calls and messages to users when away from their desk or the office, based on a user-predetermined Forward phone number maintained in the desktop communications manager

**E-mail processing** via integrated Microsoft® Exchange or other popular e-mail systems

- E-mail message queuing and delivery
- Integrate available application functionality for e-mail and knowledge management and automatic responses to frequently asked questions

**Desktop faxing** via the Banking Interaction Center's built-in fax server

- Desktop fax viewer
- Simple fax on demand
- Auto routing to user extension mailbox

### Unified messaging

- Turns user's e-mail inbox into universal repository for e-mails, voicemails and faxes
- Streamlined message management
- Chat messaging (while away)
- Remote e-mail access via telephone
- Fax forward to alternate number

**Voicemail only** if full unified messaging isn't desired

**Speech recognition**, including DTMF-unified input tools and support for Nuance, ScanSoft® SpeechWorks® and other speech recognition engines

**Message notification** for new faxes and voice messages via pager or outcall

- Integrated data processing to speed member transactions
- Total branch employee utilization to handle phone requests, faxes, e-mails, and Web interactions with external parties

**Minimal user training/ retraining**, since the Banking Interaction Center system utilizes standards-based telephones and intuitive point & click user interfaces

## For IT Staff and Administrators Single-point Control

### Central administrative interface

- Configure and maintain all Banking Interaction Center modules: IP PBX, voicemail, unified messaging, fax server, ACD with screen pops, presence management settings, and chat server including intercom chats among users
- Intuitive "wizard"-driven system implementation
- Configure new users, lines and stations in Windows®-based environment
- Make adds, moves, and changes in house, in minutes
- Centralize Banking Interaction Center administration across distributed branch offices via a WAN or LAN
- Replace multiple system administration interfaces/applications required for "multi-box" proprietary communications systems
- Configure and manage integrated add-on modules

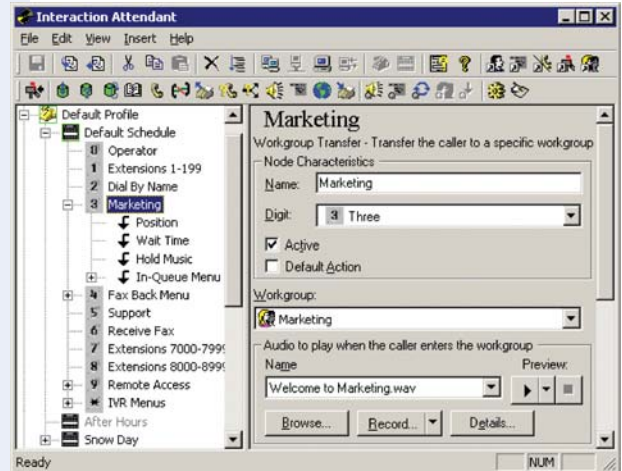
### Automated attendant interface

- Configure call routing to individual users as well as workgroups
- Configure station transfer routines to standalone station or station group
- Create and update on-hold messages, greetings, line, time of day, scheduled events, holiday/after hours menus, and unplanned closings such as snow days
- DID/ DNS routing to specific menus or queues

### Real-time system monitoring in the Banking Interaction Center desktop communications manager interface

**User-definable alarms** that alert supervisors when important conditions occur

**Cradle-to-grave reporting** streamlined by more than 75 standard reports



No complex application development or customization needed. The Banking Interaction Center system's built-in auto attendant puts your IT staff in complete control of call routing and related voice functions. One interface. No more organizational maze for employees or customers.

## For your Banking Organization Improve Communications Control

**Distributed branch support** via remote Banking Interaction Center server capability or SIP networks for voice over IP (VoIP)

### IP-PBX call processing

- Inherent automated attendant to structure call routing schedules, automate call answering processes, configure dial by name and "navigational" menus, and more

**Automatic call distributor (ACD) and virtual queue across locations;** add optional application functionality for network-based pre- and post-call routing

**Interactive voice response (IVR),** fully configurable without adding another "box" to the Banking Interaction Center system

**Real-time presence management** organization-wide

**Built-in multi-lingual support** for English, Spanish, Japanese, and other languages

### Integrate your Contact Center and Data Processor

**Blend inbound and outbound interactions** to fully utilize agent resources

**Skills-based routing,** plus priority and selective routing

**CTI screen pop plus tight integration with data processors** from Symitar, ULTRADATA, USERS Inc. and other industry giants

- Route customer account records along with interactions
- Screen pop customer info to contact center agents as well as branch employees

**Service module integration** to Onyx™, Microsoft® Business Solutions CRM, FrontRange HEAT® and other service applications

**Integrated interaction tracking** to capture interactions and tie them to your data processor

**Workforce management application integration** for historical group statistics; use IEX Totalview, Blue Pumpkin® Director - Essentials, Blue Pumpkin Director - Enterprise, or GMT

### Comprehensive supervisory monitoring

**Display board management** with the integrated solutions from Interactive Intelligence or wallboard integrations from Symon, Adaptive or Inova

### Enhance Your Web Site

**E-mail and Web self-service**

**Hierarchical text chat and e-mail response management**

**Secure Web collaboration,** complete with Web page browsing/page push

**Merge IVR and ACD data into HTML templates**

- Comprehensively track customer transactions and streamline reporting
- Merge data from databases and other Banking Interaction Center system sources

**Online forms completion** for loan applications and other documents

**Permissive online transactions** for financial services, bill presentation/payment and other secured banking services

### Record Interactions

**Inherent call and Web chat recording** for analytics, customer service training, transaction confirmation, telemarketing compliance, etc.

- Automatically generates recorded audio file in .wav format

### Create and Manage Outbound Campaigns

**Outbound power, preview, and predictive dialing**

**Automated multi-modal ("agentless") campaigns**

**Call-handling script authoring tools**

**Comprehensive campaign reporting and supervision**

### Equip Remote Agents and Mobile Employees

**Web browser access** to the Banking Interaction Center desktop communications manager and to unified messaging

- Chat messaging while away
- Remote e-mail access via telephone

**Fax forward** to alternate number

**Available Forward and Follow-Me** to forward calls and messages to users when away from their desk or the office

## Complete System “Ready to Go”

### No assembly required...

The open, non-proprietary Banking Interaction Center system comes completely pre-integrated to speed implementation and reduce pain thresholds.

#### Underlying system software

- Microsoft® Windows® 2000 operating system
- Text-to-Speech software
- Speech recognition engine (optionally available)

#### The Banking Interaction Center software suite

- Base Banking Interaction Center software
- Predictive dialing/ outbound campaign management (optionally available)
- *Interaction SIP Proxy™* (optionally available)
- Interaction recording and/ or tracking (optionally available)
- E-mail/ knowledge management/ FAQ auto response (optionally available)

#### Hardware

- Certified server built on your choice of Intel-based servers from IBM®, HP, Dell™, Advantech, or Alliance Systems
- Certified telephony layer (boards or software)
- Certified phones or softphone clients, from basic end-user SIP devices to sophisticated phones for executives, USB phone headsets and standard analog phones
- Optional SIP gateway/channel bank

#### Services and a la carte

- Bundled services offering via Interactive Intelligence Partners
- Infrastructure planning, including security and validation (Quality of Service) services
- Integration, installation, training and support

## SIP-enabled IP telephony

Banking Interaction Center comes fully equipped to support the Internet Protocol (IP) and the software-based Session Initiation Protocol (SIP) open communications standard for voice over IP (VoIP).

- Leverage VoIP via SIP for least-cost routing between locations using the Internet
- Launch the Banking Interaction Center system with traditional TDM telephony voice boards, migrate to VoIP at your own pace, and keep the same Banking Interaction Center system interfaces and applications throughout
- Utilize the Intel® NetStructure™ Host Media Processing (HMP) Software for an optionally available 100% software solution that replaces complex telephony cards for SIP-driven RTP audio, conference and voice media resources
- Migrate from one call switching platform to another and maintain current applications

## Simplified deployment

Use a site-specific Banking Interaction Center server or network connection to quickly deploy the Banking Interaction Center system to new locations. The system's built-in graphical application generator also lets you develop and deploy new applications and services for branch as well as contact center and HQ requirements, with all applications centrally administered from headquarters.

## Central administration

One interface at headquarters lets IT staff configure Banking Interaction Center system lines, stations and users for all offices, branch locations, the contact center, etc.—and to streamline moves, adds and changes between locations. Remote sites require only predictive maintenance, with maintenance alerts automatically channeled back to HQ. On-site also is break fix only.

## Business continuity, disaster recovery, fail-over and security

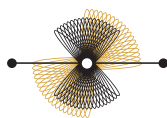
Meeting business continuity and regulatory requirements is critical to any financial institution. By replacing proprietary multi-box hardware with a single communications platform and bundled application suite, the Banking Interaction Center provides fail-over and redundancy capabilities through the automated site-to-site mirroring of Banking Interaction Center servers. Should severe weather, grid outages or malicious acts cause a disruption, IT staff at your organization's designated fail-over site simply activate the mirrored server, which takes less than 5 minutes.

Or if configuring the IP-ready Banking Interaction Center system over a SIP network, your organization can use SIP Proxy servers for all but two sites and still provide complete fail-over capability during a disruption. Remote functionality additionally lets employees at a disrupted site log on (by telephone) to the system via the fail-over site and immediately begin taking calls.

The results: Banking operations and communications remain functional throughout virtually any disruption, and your bank reduces business continuity planning time, system administration and costs by eliminating the need for individual mirrored systems across several sites.

## For More Information and Availability

For more information on *Banking Interaction Center*, visit [www.ININ.com](http://www.ININ.com) or e-mail [info@ININ.com](mailto:info@ININ.com).



### INTERACTIVE INTELLIGENCE®

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Interactive Intelligence Inc. (Nasdaq: ININ) was formed in 1994 and today is a leading developer of software for the enterprise, IP telephony, contact center automation and unified communications. The company is headquartered in Indianapolis, Indiana, and maintains offices throughout North America, Europe and the Asia-Pacific with more than 1,000 customers globally.

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