

Interactive Intelligence Inc.

A global developer of Microsoft®-based business communications solutions.



FOR CREDIT UNION ORGANIZATIONS THAT WANT MORE THAN JUST DIAL TONE FROM THEIR CURRENT PBX. CREDIT UNION INTERACTION CENTER™ (CUIC) IS THE MICROSOFT®-BASED IP TELEPHONY SOLUTION DESIGNED TO IMPROVE BUSINESS COMMUNICATIONS WITH YOUR MEMBER BASE. UNLIKE THE PROPRIETARY PHONE SYSTEMS FROM OTHER PBX VENDORS... CUIC IS THE OPEN SYSTEM THAT DELIVERS ALL CREDIT UNION COMMUNICATIONS REQUIREMENTS.

FEATURES OVERVIEW

IP-based Business Communications for Credit Unions

CREDIT UNION INTERACTION CENTER™.

One complete system for dispersed credit unions.

“It’s a great thing to be able to completely replace a communications system with something so much more feature-rich and sophisticated, yet not have to add a single additional IT person to manage it.”

— Steve Ervolino

*VP, Information Services
and Technical Support*

Dupaco Community Credit Union

www.dupaco.com

CREDIT UNION INTERACTION CENTER offers complete yet open IP communications in one flexible solution.

The Credit Union Interaction Center system comes with everything you need to improve communications between employees and members: IP PBX call processing, automatic call distributor (ACD) with priority as well as skills-based routing, interactive voice response (IVR) automation, CTI screen pop and data processing integration, multimedia interaction queuing, outbound campaign management and more. It’s even ready for SIP and voice over IP (VoIP) the minute you implement it.

Seamless business continuity

At the main office, at every branch, in the contact center, and for employees on the road or working remotely, Credit Union Interaction Center (CUIC) reaches every corner of a credit union organization with its “global” communications for IP PBX, group messaging and collaboration. All you need is the single CUIC system to equip 800 employees in one location plus 50 or more agents in your call center. Remote CUIC server capability or SIP networks for VoIP let you scale to 800 remote and mobile users and to 4,000 users across multiple sites.

More critically, your members will appreciate the “seamless” connections that lead to faster interactions and more comprehensive service no matter where your employees are located.

Key benefits

Credit Union Interaction Center’s pre-integrated features, platform independence and non-proprietary open software architecture leads to benefits unique in the credit union industry:

Offer superior service that attracts and retains credit union members, and that creates new revenue opportunities

Maximize employee productivity from HQ and each branch service center all the way to contact center agents and remote and mobile employees

Improve communications control across a dispersed credit union organization

Reduce total cost of ownership of your overall communications system and associated phones and equipment



For Member Services

Attract and Retain Members 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 member calls
- Identify caller by name based on Account ID entry
- Route calls to appropriate groups (such as Collections) based on member account status
- In-queue announcements to up-sell and cross-sell products

Proactive member contact

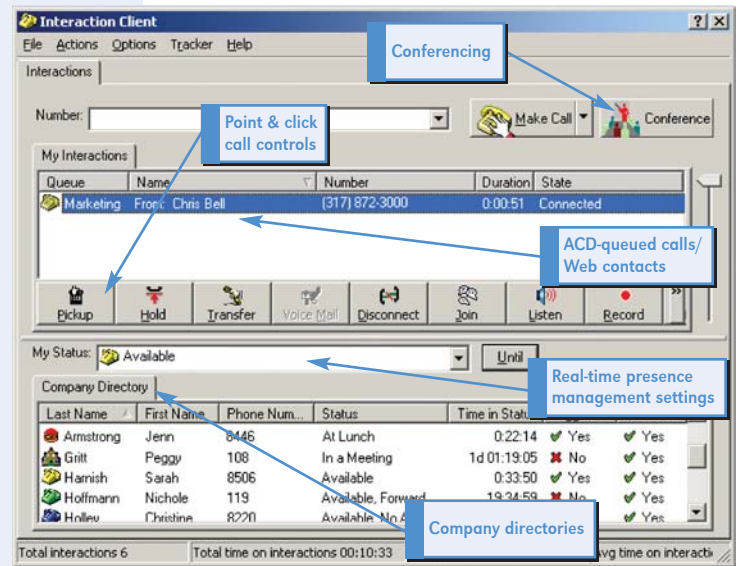
using e-mail, the Web, and outbound call campaigns

Post-call satisfaction surveys

to invite member feedback in automated format

Member analysis of information

containing the history of each member's interactions



"Employee productivity needs to improve."
 CUIC'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 member'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 CUIC'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 CUIC 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 CUIC 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 CUIC 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

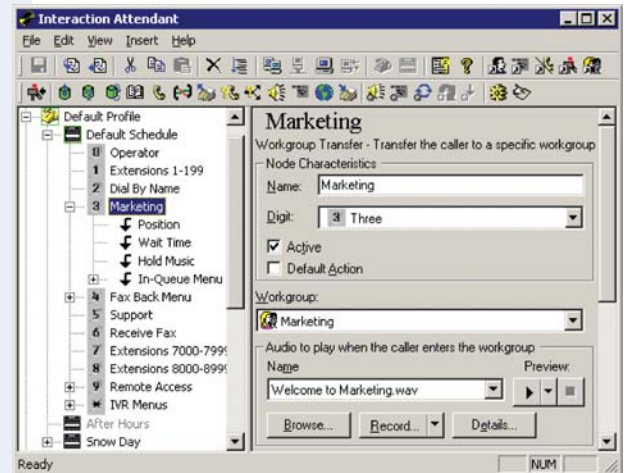
Automated attendant interface

- 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/ DNIS routing to specific menus or queues

Real-time system monitoring in the CUIC 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 CUIC 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 members.

For Your Credit Union Organization

Improve Communications Control

Distributed branch support via remote Credit Union Interaction Center (CUIC) 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 CUIC 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 member account records along with interactions
- Screen pop member 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 member transactions and streamline reporting
- Merge data from databases and other CUIC system sources

Online forms completion for loan applications and other documents

Permissive online transactions for financial services, bill presentation/payment and other secured credit union services

Record Interactions

Inherent call and Web chat recording for analytics, member 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 CUIC 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 Credit Union Interaction Center (CUIC) 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 CUIC software suite

- Base CUIC 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

Credit Union Interaction Center (CUIC) 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 with traditional TDM telephony and voice boards in the CUIC server, migrate to IP at your own pace, and keep the same CUIC system interfaces and applications throughout
- Migrate from one call switching platform to another and maintain current applications

Optional 100% software solution with the Intel® NetStructure™ Host Media Processing Software (HMP) to replace complex telephony cards for SIP-driven RTP audio, conference and voice media resources.

Simplified deployment

Use a site-specific CUIC server or network connection to quickly deploy Credit Union Interaction Center 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 Credit Union 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.

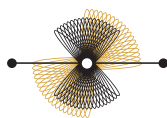
Business continuity, fail-over & security

For regional configurations, Credit Union Interaction Center supports each on-site fault-tolerant CUIC server using an interfaced Dataprobe switch card to detect that each machine is up and running. This process also establishes one redundant server as a disaster site, say at a branch office, and switches calls from HQ to that site should a network ever fail. The core CUIC server provides fail-over to analog lines and to N+1 (for unified messaging) for added system reliability.

Also configure E-911 service from local carriers to route outbound calls to the correct Public Safety Answering Point (PSAP) based on appropriate direct inward dial number. For security, the IC system consolidates and securely process transactions conducted via e-mails and Web chats, and securely routes faxes via DNIS.

For More Information and Availability

For more Information on *Credit Union Interaction Center™*, visit www.ININ.com or e-mail info@ININ.com.



INTERACTIVE INTELLIGENCE®

Interactive Intelligence Inc.®

A global developer of Microsoft®-based Business Communications Solutions.

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.

WORLD HEADQUARTERS

7601 Interactive Way
Indianapolis, IN 46278 USA
317.872.3000 voice and fax

EUROPE

8 The Square, Stockley Park
Heathrow, Uxbridge, Middlesex UB11 1FW
+44 20 8867 3670 voice and fax

ASIA PACIFIC

Suite 24.3, Level 24 Menara IMC
8 Jalan Sultan Ismail, 50250 Kuala Lumpur, Malaysia
+603.2715 3333 voice

www.ININ.com