



Episys® Contact Event Manager™

Capture and track sales and service interactions
with members for enhanced efficiency



Would your staff benefit from an efficient, effective member relationship management system?

BUSINESS VALUE

- ▶ Enhance Service
- ▶ Increase Sales
- ▶ Improve Operations

COMPATIBILITY

- ▶ Episys®

IT WORKS LIKE THIS

Episys Contact Event Manager is a user-friendly member relationship management solution that is hosted for you. It formalizes the process of documenting sales and service interactions by providing an Episys-integrated method of categorizing and prioritizing events. Sales events, service events, product requests, life events, and more are captured and routed to the appropriate department for resolution or follow-up.

A sales tracking feature runs nightly to verify closed sales events have had the designated share or loan type opened along with other requirements such as a minimum balance, transactions posted, or an existing share or loan. Points are assigned for closing or referring sales events, and a sales dashboard and detailed reports offer credit unions an easy way to easily calculate incentives.

You can create customized event types and categories and assign them to specific individuals or groups. You can also attach procedures to events. Users, meanwhile, have the ability to create appointments when working an event. Episys Contact Event Manager can also notify assigned staff by email if an action is due and escalate events to management if an issue is not resolved in a timely manner. When users add ad hoc or standard comments to events, they can choose whether to email or text members about specific comments.

A communication history screen consolidates all emails and text messages to members, making it easy for your staff to view follow-up messages. When a member later contacts your credit union, your service staff can quickly view the “who, what, when, where, and how” of all past interactions.

CAPABILITY HIGHLIGHTS

With Episys Contact Event Manager’s batch event feature, credit unions can upload files and create events in a batch. The batch event feature is useful for creating sales offers and events for new member accounts, maturing certificates, or loans without automated payment transfer. A reporting feature enables managers to analyze the service issues members are experiencing and take steps to minimize future occurrences. The solution also helps managers assess staff performance regarding timely error resolution. An event extract feature allows credit unions to receive and upload daily event details. These details may be uploaded into Advanced Reporting for Credit Unions™ (ARCU) or another data warehouse.

EASY INSTALLATION

Episys Contact Event Manager requires minimal time for installation and training. You can take control of sales and service events quickly and see the results of better tracking and improved member service.

WHAT IT DOES:

- ▶ Captures, routes, and tracks member interactions including sales events, service events, and life events.
- ▶ Verifies if a qualifying share or loan opened in Episys when a sales event closes.
- ▶ Notifies members by email or text about event status.
- ▶ Includes a communication history screen.
- ▶ Eliminates time-consuming, error-prone manual processes.
- ▶ Enables customization of event types, categories, and subcategories, and what person or group they are assigned to.
- ▶ Enables staff to schedule and attach appointments to events.
- ▶ Notifies staff of new events with email reminders before events are due.

- ▶ Escalates events to designated managers when issues or requests are not addressed in a timely manner.
- ▶ Includes a custom 360-degree view of the Episys account relationship, which displays open contact events and quick event creation sections.

WHAT IT DOES FOR YOU:

- ▶ Offers staff a more comprehensive view of member needs.
- ▶ Streamlines member notification for follow-up or resolution.
- ▶ Enhances service to improve member retention.
- ▶ Offers managers critical information to reduce service issues.
- ▶ Supports the rewarding of high-performing sales staff.