

Click here to see a CONNECTIONS demonstration



What is CONNECTIONS?

CONNECTIONS is a browser-based CRM (Customer Relationship Management) system which allows financial institutions to “know” their account holders. By automating many sales, and marketing initiatives, CONNECTIONS makes it easier for institutions to understand the specific needs of each account holder and their household relationships. Once institutions identify these aspects, CONNECTIONS can help predict behavior – thereby enabling institutions to acquire new accounts, retain existing accounts, and identify potential accounts.

CONNECTIONS offers many tools to empower institutions to build and retain account holder relationships:

Household Profile

Analyzes account holders on individual or household levels based on address, SSN, EIN, or through other relationships within the household. Predictive algorithms calculate the product most likely to be purchased by each household.

Database Marketing

Targets the right audience with the right offer. CONNECTIONS increases an institution’s chance of receiving positive marketing responses from new, existing, and potential account holders.

Prospect Tracking

Tracks the status of every prospect by product, employee, and location. Creates recommendations and referrals for account holders and prospects; schedules and tracks follow-up tasks and results.

Incentive Plans

Initiates and promotes employee sales through point-based incentive plans; automatically tracks referrals, recommendations, and new account holders by employee and rewards the appropriate employee.

Reporting

In addition to comprehensive standard product, service and measurement reports based on your institution’s data, CONNECTIONS enables users to perform queries that create in-depth reports which analyze accounts, demographics, trends, and profitability.

Profitability

Determines most profitable accounts, products, and households to retain profitable relationships, shift unprofitable to profitable relationships, and leverage possible loss.

Pricing Module

Provides price modeling of any account or household for an analysis of profit potential. Scenarios may be set and saved for existing or potential accounts.

Sales and Service Culture

Provides sales and service training to employees on effective ways to interact with existing and potential account holders. This provides an institution the power it needs to move toward a higher level of service.

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