

## Siebel Interactive Selling Suite for the Financial Industry

### Data Specifications

#### Siebel Interactive Selling Suite

- Context-sensitive cross-sell and up-sell capabilities
- Centralized product and selling knowledge
- Multichannel support
- Standards-based integration
- Integrated multichannel personalization

### Key Features

#### Advice and Configuration

- Highly interactive, instantaneous response
- Interactive needs analysis
- Sophisticated self-service configuration
- Context-sensitive advice and guidance
- Customizable look and feel
- Supports popular Web development technologies

#### Dynamic Commerce

- Multiple dynamic auction formats
- Integrated bidding agents
- Dynamic auction closing

#### Electronic Pricing

- Advanced rules-based pricing

#### Catalog and Online Ordering

- Interactive, multimedia catalog
- Online ordering support
- Out-of-the-box integration to credit and tax systems
- Automatic order status updates

Customer expectations of financial services organizations have never been greater—from requiring a broader range of products to expecting personalized 24x7 service. Siebel Interactive Selling Suite (ISS) helps banking, brokerage, investment, and insurance companies exceed the expectations of the current client base while attracting, engaging, and acquiring new customers.

#### Customer-centric Advantage

Siebel ISS applications have been designed from the customer's perspective of the selling experience to keep them engaged in the activity. By providing instantaneous responses, high interactivity, and comprehensive product information, Siebel ISS applications help financial organizations increase customer loyalty, improve order accuracy, and provide a consistent multichannel experience.

Used internally to improve sales productivity, or externally to enable customers to find their ideal financial package, Siebel ISS applications improve

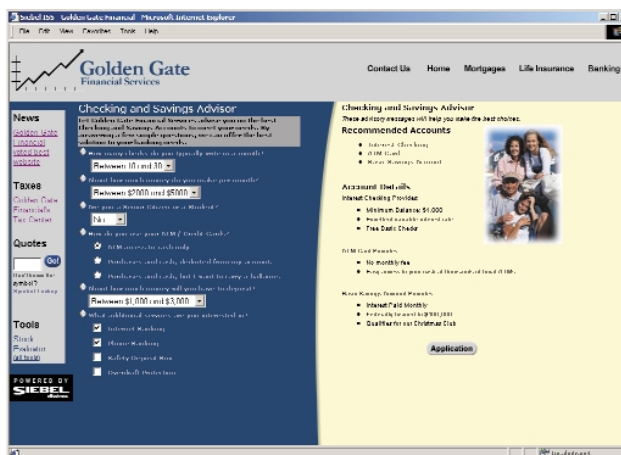
customer satisfaction while increasing revenue and reducing operating expense. With Siebel ISS, financial organizations are better able to engage and serve consumers, small businesses, and corporate customers across all customer touchpoints.

#### Consistent Customer Experiences

Helping financial institutions overcome the challenges associated with evolving product and service lines, Siebel ISS applications create a uniform knowledge base across all sales channels. With current pricing, purchase terms, and legal requirements at hand, Siebel ISS turns novice representatives into product specialists, and enables customers to expertly choose and configure their own financial packages from an unlimited variety of options via the Web.

#### Customer Self-service

Siebel ISS applications lead customers through a series of questions to help them identify their unique financial needs, offer interactive guidance to select products and services, and present customized solutions, such as the ideal checking account,



Siebel eAdvisor presents a series of interactive questions to help financial customers make better purchasing decisions.

mortgage terms, or life insurance plan. Every selection returns an immediate response making it easy for users to explore features, consider “what if” scenarios, and make trade-offs between features and price as they customize their ideal financial package.

Built-in sales rules in Siebel ISS applications can be used to suggest additional products and services at the point of order to increase cross- or up-sell opportunities and raise average transaction values. Finally, electronic pricing simplifies fee calculation—even customizing rates for new services based on defined plans or total customer value.

#### **Building a Brand on the Web**

Siebel ISS enables organizations to leverage new channels, such as the Web, while improving the efficiency of existing channels. Because Siebel ISS enables an organization to convey a consistent message across all sales channels, customers receive the same accurate information, resulting in better service, which improves customer acquisition and retention.

In addition, Siebel ISS helps financial services organizations establish their brands on their Web sites via a fully customizable user interface and enables these companies to create compelling online experiences for their customers by using standard elements such as drop-down menus or leading-edge Flash™ animation.

#### **Lower Total Cost of Ownership**

Siebel ISS enables rapid deployment and is easily maintained without programming.

Siebel ISS applications support open standards to allow seamless integration with Siebel eBusiness solutions and third-party back office and legacy systems, as well as complementary eCommerce applications.

#### **Exceed Customer Expectations**

By making the skills and best practices of the customer-facing employees available via the Web and providing prompt customer service, Siebel ISS makes it possible to exceed the expectations of the current client base while attracting, engaging, and acquiring new customers.

#### **Siebel Interactive Selling Suite**

Siebel ISS is a complete suite of applications designed to help organizations engage, acquire, and retain customers across multiple touchpoints.

**Siebel eAdvisor** provides interactive advice to help users decide on an ideal solution.

**Siebel Configurator** helps field and telesales professionals configure products and services and ensures accurate orders.

**Siebel eConfigurator** helps organizations simplify Web-based selling of complex and customizable products and services, ensuring accurate orders.

**Siebel eSales** provides an interactive, personalized, Web-based product catalog and manages online orders, including order confirmation, shipping information, and ongoing order status.

**Siebel ePricer** helps to eliminate price confusion and enhance customer loyalty by facilitating consistent, customized pricing.

**Siebel eAuction** enables businesses to create branded auctions to increase financial returns on inventory and develop new sales channels.

**Siebel ISS Integration Server** simplifies data integration between enterprise databases and Siebel ISS applications to automatically bring product information into Siebel eAdvisor or Siebel eConfigurator applications, and to pass customer orders to third-party eCommerce systems.



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