



Avaloq Client Communication Management (Avaloq CCM)

Avaloq enables banks and wealth managers to:

- Reduce IT cost and increase business agility
- Empower business users to manage client communication independently from IT
- Provide clients and advisors with a seamless and continuous experience across all channels
- Automate common processes to reduce time-to-market and increase revenue
- Reduce the costs to fulfil compliance and regulatory requirements

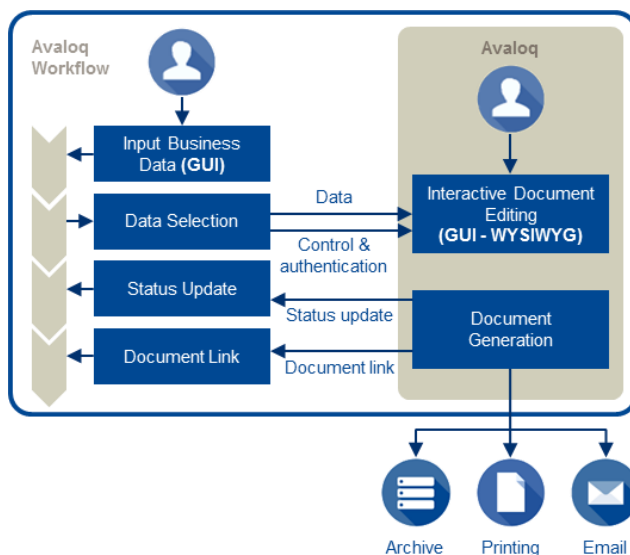
Avaloq's Client Communication Management

Avaloq offers a comprehensive set of managed solutions to support banks and wealth managers in achieving lower costs, increased efficiency and operational excellence throughout their organisation.

Client Communication Management (CCM) is becoming an increasingly important component of the overall wealth management solution. This is driving the current strategic shift in the output management industry:

- from standardised towards individualised information
- from simple paper printing towards multi-channel communication
- from one-way information towards bi-directional communication
- increasing regulatory and compliance requirements
- document processes becoming an integral part of wealth management business processes

To address these trends, Avaloq integrates a professional third-party client communication management (CCM) solution in its offering by proposing three add-on modules CCM Standard, CCM Interactive and CCM Presentation.



“Dividing document output needs into structured, interactive, and on-demand processes can help business process pros get a better handle on their diverse application needs.”

- The Forrester Wave™: Document Output for Customer Communications Management

“Most enterprises investing in customer correspondence software realise their ROI within a year... This ability to realise a return helps make CCM software a good investment despite poor economic conditions.”

- The Forrester Wave™: “The ROI of Correspondence Management” 2009

CCM Standard

CCM Standard allows production of client reports and documents with pre-defined content, such as transaction advices or portfolio statements, for various business needs and in various output formats. Furthermore, it covers complete output processes such as sorting, aggregation and dispatching to downstream systems such as printing, e-mailing and archiving.

CCM Presentation

CCM Presentation is a simple-to-use, web-based tool facilitating conversations between a relationship manager (RM) and clients. Every presentation to clients can be prepared with real-time data and individualised content even during a live client engagement. CCM Presentation enables more effective communication.

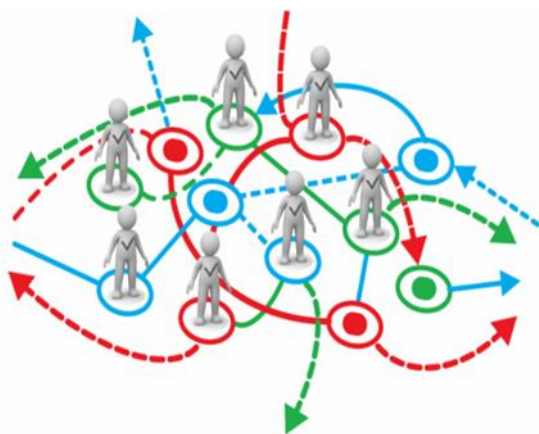
CCM Interactive

CCM Interactive is the module for interactive composition of documents as part of business process, i.e. the content of a document can be edited by a business user at production time.

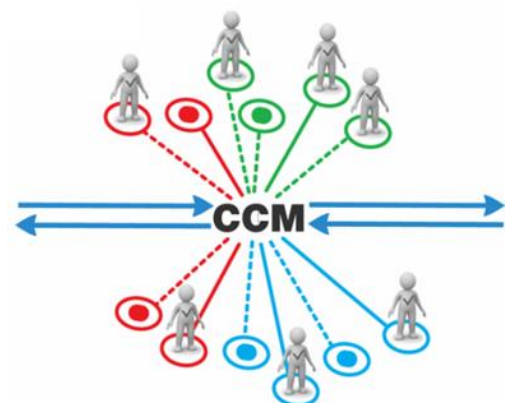
The module enables integration of document composition processes into business processes. It ships with a runtime document editor and a text component management system.

Avaloq – The Leading Customer Communication Management Solution (CCM) for Finance

- **Serving your business and clients:** Avaloq solutions have been designed specifically to make it easy to use through text modules, presentation and business rules, giving your advisers and product experts control over how they communicate with their customers – making the business more agile and cutting down on IT costs.
- **Creating advanced integration:** Banking and technology software adapters help our clients to integrate their core banking and delivery applications with the DocFamily document platform. The bi-directional integration allows banking application to understand the behaviour of their clients more easily.
- **Communicating via multiple channels:** Avaloq’s CCM solutions help you move from less efficient and error-prone print-based methods of communication towards using a variety of channels to more effectively manage communications in line with individual customer preferences, and without being held back by limitations of existing systems.
- **Ensuring rapid return on investment:** Avaloq’s CCM solutions significantly change the economics around communications with your customers within a timeframe of around 12 months on average – while at the same time improving service quality.
- **Making it more personalized:** Each client interaction you have can be used as a learning experience from which you can create a more targeted communication approach for the next time. This is done by recording how customers react and respond to different ways of communicating with them, to enable to personalize future contacts.



- Avaloq value proposal:**
- CCM Standard
 - CCM Interactive
 - CCM Presentation



CCM = Confusing Communication Management?

Avaloq Client Communication Management

Winner of Transaction Front Office Solution, Transaction Processing and Outsourcing Solution

"The judges' eye was caught by the winner's success based on listening to the needs of clients, markets and the regulators. Specific operational requirements unique to the client proposition are identified and discussed in the initial workshop."



Leader in the Magic Quadrant for international retail core banking

"Avaloq leverages four primary sources of data gathering – business process outsourcing (BPO), customers, partners, and others, such as universities – to sharpen market insight."



Strong customer relationship management solution

"Vendor award of wealth management solution for the upper mass affluent segment in Continental Europe."



Best-selling private banking solution in the world 2015 (3rd time in a row)
IBS sales league



CRM Component Win at Global Giant
Société Générale

About Avaloq: Essential for Banking

The Avaloq group is an internationally leading Fintech company. It has a reputation for the highest standards in engineering excellence, is passionate about innovation and invests more in R&D than any other provider for the financial industry. The company's meticulous and uncompromising attention to detail has enabled it to achieve a unique 100% success rate in its implementation of banking solutions around the world. The entire Avaloq

Banking Suite is consistently designed throughout and delivers unique business benefits to its users as well as strong technical performance. Avaloq is the only independent provider for the financial industry to both develop and operate its own software. Business process and IT outsourcing solutions are offered from Avaloq's BPO centres in Switzerland, Germany and Singapore. The company employs more than 2,200 highly qualified banking and IT

specialists and has a global customer base of more than 155 financial institutions in over 20 countries worldwide, including tier one banks in the most demanding financial centres. Headquartered in Switzerland, Avaloq has branches in Berlin, Frankfurt, Geneva, Hong Kong, Leipzig, London, Lugano, Luxembourg, Paris, Singapore, Sydney and Zurich. It has development centres in Zurich, Edinburgh and Manila. More information on www.avaloq.com