

# Next Gen IBS Feature Mapping

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## Next Gen IBS Mission

Next Gen IBS will allow bankers to easily execute tasks and redirect their energy to providing high value interactions with customers, thus enabling branches to sustainably grow their business.

FEATURE ICONS		FEATURE ROLL-OUT	
	<b>HEADLINE FEATURE:</b> Lead value driver		Existing IBS Functionality
	<b>CORE FEATURE:</b> Initial establishment of feature		New IBS Functionality
	<b>FEATURE EVOLUTION:</b> Continuous evolution on product feature		Cross LOB Integration Required
			North Star to guide feature evolution

	ACTIONABLE INFORMATION	WORKFLOW OPTIMIZATION	SYSTEM INTELLIGENCE	HOLISTIC INTEGRATION
	<p><b>VALUE DESCRIPTION</b> Equip bankers with easy access to consolidated and complete customer information that enables improved servicing and smarter product and service recommendations, ensuring customers that banks know what is important to them.</p>	<p><b>VALUE DESCRIPTION</b> Increase banker efficiency by simplifying workflows and automating high volume processes, creating more time for bankers to build personal relationships with customers.</p>	<p><b>VALUE DESCRIPTION</b> Evolve and automate the ability to make product and service recommendations by leveraging data and intelligence living in existing and new systems.</p>	<p><b>VALUE DESCRIPTION</b> Ensure that 3rd party systems and information work in concert with the Next Gen IBS to create a consistent experience for bankers in the core banking ecosystem.</p>
Capability Sets / Features				
Customer Information	<ul style="list-style-type: none"> <li><b>View Summary of Products &amp; Services</b> View of a customer's individual products/services (LOBs: Card, Digital)</li> <li><b>View Status of Service</b> Status on services the customer is enrolled in (active/inactive, last login, etc.)</li> <li><b>View Interaction History</b> View of all customer touchpoints with a customer</li> <li><b>View Customer Relationship Diagram</b> Visual representation of a customer's relationships (people, accounts, etc.)</li> <li><b>View Customer Documents</b> View of scanned documents related to a customer (e.g. drivers license, statements, etc.) (LOBs: Card, FCM)</li> <li><b>View Images</b> View images of scanned items (e.g. checks) (LOBs: FCM)</li> </ul>	<ul style="list-style-type: none"> <li><b>Pre-Populate Forms with Existing Customer Data</b> Ability to use available information to be pre-populated in forms, etc.</li> <li><b>Manage Customer Documents</b> Manage a customer's documents (e.g. upload, edit, etc.) (LOBs: FCM, Card, Digital)</li> <li><b>Manage Notes/Remarks</b> Ability to add remarks/notes to a customer profile</li> </ul>	<ul style="list-style-type: none"> <li><b>View Customer Metrics</b> Ability to view customer metrics around profitability, risk, loyalty, etc.</li> </ul>	<ul style="list-style-type: none"> <li><b>View Entire Customer Relationship (external)</b> Display all customer information from non-FIS/3rd party applications</li> <li><b>View Document Archive</b> Ability to view archived documents (LOBs: FCM)</li> <li><b>Generate Tasks</b> Ability to create and assign a task directly from a remark/note</li> </ul>
Customer Growth		<ul style="list-style-type: none"> <li><b>Notify Banker of Life Event</b> Reminder notifications on important days (e.g. birthdays, anniversaries, etc.)</li> <li><b>View Links for Service Enrollment</b> Links to existing service enrollment workflows (LOBs: Card, Digital)</li> <li><b>Enroll Customer in Service</b> Ability to enroll a customer in a product related or self service (online banking) service directly from the customer profile (LOBs: Card, Digital)</li> </ul>	<ul style="list-style-type: none"> <li><b>Recommend Products/ Services</b> Based on customer behavior and existing data</li> <li><b>Recommend Products/Services</b> Based on life events (system intelligence)</li> <li><b>Integrate with PinPoint Marketing</b> Ability to leverage existing PinPoint Marketing offerings and metrics as input for recommended products/services</li> </ul>	
Customer Account Servicing (General)	<ul style="list-style-type: none"> <li><b>Verify/Authenticate Customer</b> Ability to authenticate a customer in person or remotely</li> </ul>	<ul style="list-style-type: none"> <li><b>Change Customer's Personal Info</b> Ability to update information from a customer's profile</li> <li><b>Change Product Details</b> Ability to update product details like service level details, product type, etc.</li> </ul>	<ul style="list-style-type: none"> <li><b>Change Online Banking Settings</b> Ability to manage details of the services a customer is enrolled in</li> <li><b>Change Account Details</b> Ability to update account details (e.g. account titling)</li> </ul>	<ul style="list-style-type: none"> <li><b>Personalized Customer Authentication</b> Ability for customer to select preferred form of authentication</li> <li><b>Authenticate Customer Automatically</b> Full automated authentication protocol for both in-person and remote (phone) customers</li> </ul>
Customer Account Servicing (Transactions)	<ul style="list-style-type: none"> <li><b>View Account Financials</b> Ability to view and update approved/pending transactions</li> <li><b>Statement History</b> View of all past individual and combined account statements</li> </ul>	<ul style="list-style-type: none"> <li><b>Manage Transactions</b> Ability to view and update approved/pending transactions</li> <li><b>View Credit Card Details</b> Ability to view credit card related information</li> <li><b>View Debit Card Details</b> Ability to view debit card related information (LOBs: Card)</li> <li><b>Manage Money Transfers</b> Ability to setup and manage existing transfers (LOBs: Card)</li> </ul>	<ul style="list-style-type: none"> <li><b>Flag a Transaction</b> Ability to flag a suspicious transaction, which notifies the FIS Fraud team</li> <li><b>Engage Credit Card Services</b> Ability to manage credit card related servicing requests</li> <li><b>Engage Debit Card Services</b> Ability to manage debit card related servicing requests</li> <li><b>Make a One-Time Payment</b> Ability to pay an outstanding bill (e.g. credit cards, etc.)</li> <li><b>Make a One-Time Loan Payment</b> Ability to add notes to an existing tasks</li> </ul>	<ul style="list-style-type: none"> <li><b>Recommended Actions</b> Ability to view recommended actions for a banker to take based on common high-volume workflows and customer behavior</li> </ul>
Search	<ul style="list-style-type: none"> <li><b>Search for a Customer</b> Single search field for searching combinations of customer name and PI (e.g. tax ID, SSN, etc.)</li> </ul>	<ul style="list-style-type: none"> <li><b>Launching Actions from Search Results</b> Surfacing jumping off points for high volume workflows directly in within search</li> </ul>	<ul style="list-style-type: none"> <li><b>Recommended Search Results</b> Search through combinations for keywords, and directly launching workflows from search</li> </ul>	<ul style="list-style-type: none"> <li><b>Search (Vision)</b> Search keywords related to 3rd party information related to a customer</li> </ul>
Alerts	<ul style="list-style-type: none"> <li><b>View Contextual Indicators</b> Timely information the banker should now when servicing a customer (e.g. suspicious account activity, high usage, etc.)</li> <li><b>View Fraud Alerts</b> Prominent alerts on fraud related investigation or monitoring happening on a customer</li> <li><b>View Bank Alerts</b> Email alerts summarizing suspicious account activity</li> </ul>	<ul style="list-style-type: none"> <li><b>View Missing Documents Alerts</b> Contextual alerts on the customer profile that documents are missing</li> <li><b>Automating Alert Responses</b> Ability to set thresholds that trigger actions based on alerts (e.g. send a notification to a customer)</li> </ul>		
Banker Task View	<ul style="list-style-type: none"> <li><b>View My Task</b> View of tasks assigned to the banker displaying details of task, date/person task was assigned by and date due</li> <li><b>View My Group Tasks</b> View of tasks assigned to other bankers in the team/group/department/branch, displaying details of task, date/person task was assigned by and date due</li> </ul>	<ul style="list-style-type: none"> <li><b>Manage Tasks</b> Ability to change status of task, mark as complete, assign to another banker, etc.</li> <li><b>Add New Task</b> Ability to add a new task</li> <li><b>Add Task Note</b> Ability to add notes to an existing tasks</li> </ul>		<ul style="list-style-type: none"> <li><b>Manage Workflow</b> Ability to automatically generate tasks and reminders from 3rd party systems like Outlook, etc.</li> <li><b>View 3rd Party Calendar</b> Ability to integrate information from 3rd party calendar applications</li> </ul>
Account Opening / Closing	<ul style="list-style-type: none"> <li><b>Manage Leads, Referrals, etc.</b> View of referrals, leads and opportunities</li> </ul>	<ul style="list-style-type: none"> <li><b>Onboard Retail/SMB Customers</b> Support post account onboarding for retail and SMB customers</li> <li><b>Open/Close Accounts</b> Ability to open/close a deposit, savings, retirement, etc. accounts (incl. loans)</li> <li><b>Manage Account Applications</b> Access and complete in-progress account opening applications (incl. loans) (LOBs: Card, North American Lending)</li> </ul>	<ul style="list-style-type: none"> <li><b>Onboard Commercial Customers</b> Support post account onboarding for commercial customers</li> </ul>	<ul style="list-style-type: none"> <li><b>Automate Customer Checks</b> Ability to automatically run all required background checks during an account opening workflow</li> <li><b>Automate Loan Boarding</b> Ability to automatically board the loan to the core (LOBs: North American Lending)</li> </ul>
Banker Notifications	<ul style="list-style-type: none"> <li><b>View My Notifications</b> Global view of all notifications</li> <li><b>View Customer Notifications</b> Ability to view notifications related to customer behavior (e.g. sales opportunity)</li> <li><b>View Banker Notifications</b> Ability to view notifications on tasks (i.e. assigned to me, notes added) or relating to referrals</li> <li><b>View System Notifications</b> Ability to view automatically generated system notifications (e.g. banker password expiration)</li> </ul>	<ul style="list-style-type: none"> <li><b>Notification Settings</b> Ability to set channels for receiving additional notifications as well as thresholds for customer notifications (e.g. VIP customer activity)</li> </ul>		
Banker/Branch Performance	<ul style="list-style-type: none"> <li><b>View Task Performance Metrics</b> View of banker's task performance metrics (e.g. # of tasks completed, # of tasks overdue, etc.)</li> <li><b>View Banker Performance Metrics</b> View of banker's role specific performance metrics (e.g. average time on call, # of servicing requests handled, sales, etc.)</li> <li><b>View &amp; Set Goals</b> Ability to manage specific goals and measure performance/progress against those goals</li> </ul>			
Reporting		<ul style="list-style-type: none"> <li><b>Generate Reports</b> Ability to generate reports on transactions and customer behavior (e.g. exceptions report, large dollar transactions, etc.)</li> <li><b>Digitize Reports</b> Ability to digitally view generated reports in order to streamline collaboration and actions on said reports</li> </ul>		
Teller Management		<ul style="list-style-type: none"> <li><b>Issuing Assets</b> Ability to issue a cashier's check, money order, certified check, etc.</li> <li><b>Exchanging Money</b> Ability to view current exchange rates and support any transactions requiring the exchange of money from one currency to the other</li> </ul>	<ul style="list-style-type: none"> <li><b>Balancing Cash</b> Ability to view and confirm total number of transactions in a day to support a banker balancing the cash in the teller drawer</li> <li><b>Ordering Cash</b> Ability to view cash needs of the branch and place cash orders</li> <li><b>Predict Future Cash Needs</b> Ability to automatically predict cash needs of the branch to support cash ordering</li> </ul>	<ul style="list-style-type: none"> <li><b>Integrate with Bank Hardware</b> Ability to manage the printer queue for issuing items like money orders, cashier's checks, etc.</li> </ul>
Admin Tools		<ul style="list-style-type: none"> <li><b>Create/Delete Users</b> Ability to create a new user</li> </ul>	<ul style="list-style-type: none"> <li><b>Set User Permissioning</b> Ability to setup a new user's access and permissions around capabilities and content</li> </ul>	
Configuration				