

AWD[®] AWD/Contact[™]

AWD/Contact[™] for Mutual Funds

AWD/Contact[™] for Mutual Funds is DST's integrated call center solution for TA2000[™] and TRAC 2000[™]. AWD/Contact for Mutual Funds is designed for advanced call center environments, where high productivity and world-class customer service are critical. With AWD/Contact for Mutual Funds, your customer service representatives (CSRs) enjoy the benefits of a fully integrated, workflow-enabled contact center environment:

- Rapid implementation.
- Vital information in a highly visual form.
- Integration with workflow, computer telephony integration, digital call recording, and the Internet.
- Links into your other application systems for customer account information and product marketing.

AWD/Contact provides you with a unified view of all customer contacts, regardless of the channel of communication: phone, e-mail, mail, fax, Web call-back, Web collaboration, Web chat, voice-over IP, etc.

The Complete Solution

Along with AWD, AWD/Contact for Mutual Funds has all of the components you need for a complete call center solution.

DST's AWD/Voice[®] products are pre-integrated, providing interfaces to leading CTI and digital call recording systems. Because AWD/Contact[®] for Mutual Funds is fully integrated with DST's AWD[®] (Automated Work Distributor[™]) workflow and contact management solution, users have access to the complete history of customer interactions: calls, letters, faxes, e-mails, chat transcripts, and other contact points – all of which are housed in AWD's customer repository.

AWD/Contact for Mutual Funds's table-driven Business Activities feature helps you define interac-

tive, dynamic scripts to guide your CSRs through customer inquiries and customer account updates. In addition, AWD/Contact for Mutual Funds integrates with the Literature[™] and AWD/Forms[™] applications. This integration gives the CSRs the tools for optimal customer service.

Driving Your Profitability

The ability to make the most out of every interaction with a customer is critical to any call center solution. AWD/Contact for Mutual Fund's consolidated customer view presents your CSR with the overall value of that customer to your organization, as well as a record of all prior contacts. This information, combined with AWD/Contact for Mutual Fund's dynamic scripting and links to your application systems, gives the CSR every tool necessary to answer the customer's inquiry and to initiate customer account updates. The out of the box solution is pre-integrated with TA2000, TRAC 2000 and also easily integrates with other business systems such as annuities, life and brokerage systems.

Designed to Fit Your Technology Needs

AWD/Contact for Mutual Funds is designed to meet the dynamic challenges facing today's call center environments.

AWD/Contact for Mutual Fund's point-and-click design allows flexible configuration and quick setup of scripts and call-flows.



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AWD/Contact for Mutual Funds uses three-tier technology that supports XML, XSL, HTML and DHTML. The middle tier handles communication with your AWD server and other application systems. The middle tier technology can be installed on-site or hosted by DST.

We Are Here to Help

For more information on AWD/Contact for Mutual Funds, contact us at (888) DST-INFO, or visit our Web site at www.awdbpm.com.

AWD/Contact for Mutual Funds Client Summary

The screenshot shows a web browser window displaying the AWD/Contact for Mutual Funds Client Summary. The interface includes a navigation menu on the left, a main content area with tabs for Mutual Fund, Retirement, Brokerage, Annuities, and Life, and a bottom section for Customer Contact Information and Scripting.

Customer Info

Maddie Long
 Birthdate: 11/21/1967
 VIP flag: Y

TAX ID: 004-16-2002
 Email Address: mlog@customer.com
 Telephone Number: 616-843-7300

Mutual Fund Customer Value: \$9,811,510.97
 Retirement Customer Value: \$1,000,001.01
 Brokerage Customer Value: \$1,000,000.00
 Annuity Customer Value: \$1,500,000.00

Mutual Fund (Selected)

Rep	Shareowner	Status	Type	Total Shares	Account Bal
0000034	0000000004 MADDIE LONG	Open	000	.0000	\$4,713,399.58
0000034	0000000001 MADDIE LONG	Open	000	10,127.0000	\$5,098,111.39
0000034	0000000004 MADDIE LONG	Open	000	.0000	\$4,713,399.58
0000034	0000000001 MADDIE LONG	Open	000	10,127.0000	\$5,098,111.39

Fund Name: Short Term Muni bond
 Ticker Symbol: STB
 CUSIP: ST1234567

Account Information

Certified SSN(2): 004-16-2002
 NAV +/-: 26.5000 POP: 50.4762
 MADDIE LONG
 Reg Type: Individual
 DIVMOVE OPTION
 Rep Name: Bob Jones
 66 BROOKS DR
 Rep Number: 021
 BRAintree MA 02184-3839
 Financial Institution Name: UBS
 Branch ID: 124
 Social Code: 010

Combined Acct Value: \$9,811,510.97
 Collected Shares: 177,864.1350
 Collected Balance: \$4,713,399.58
 Daily Div Accrual: \$.00
 Available Balance: \$4,712,999.59
 Capital Gains (stf): Cash / Cash
 Dividend Cash

Cautions
 Uncashed checks(000000001)
 LOI(000000000)
 Audio Response

Options
 Audio Response

Attributes
 Memos
 Memo-Warning

Customer Contact Information

- Phone call on 12/07/2001 at 10:20:09 about Request Literature
- Phone call on 12/07/2001 at 13:34:37 about History

Scripting
 A new equity fund is opening in July. The minimum investment for current shareholders is \$50,000. Would you be interested in some additional information?

Total Contacts: 25 Displaying: 6 [Extended Search](#) [More](#)