

Leadfusion Launches CUSTOMERfirst™ Platform for Financial Institutions

Maximizing Revenue Returns from Financial Experience Management®

San Diego, CA (October 16, 2013) – Leadfusion introduces CUSTOMERfirst, a comprehensive platform of solutions for engaging financial consumers across channels and devices in the critical stages leading up to conversion. CUSTOMERfirst is the ideal solution for financial institutions seeking to drive revenue through customer experience initiatives. CUSTOMERfirst includes the proven Financial Experience Management technology Leadfusion clients expect, now packaged to offer improved ease of use and enhanced with multi-channel, multi-device innovations.

CUSTOMERfirst makes it easy for financial institutions to get started with best practice Financial Experience Management techniques either online or in branch or call center environments. “By empowering consumers to move across channels and devices with engaging and informative resources, product information and sales guidance, CUSTOMERfirst supports the financial purchase consideration process and accelerates buying decisions,” said Matt Kojis, Leadfusion Senior Product Manager. For financial institutions, higher consumer engagement with CUSTOMERfirst drives higher conversion rates, better quality applications, increased brand loyalty and share of wallet.

CUSTOMERfirst consolidates the full power of Leadfusion’s platform into four products: Premium Financial Tools, Guided Selling, Cross Channel Selling and Premium Email, designed to operate independently or as a single integrated solution that engages through all stages of the financial consumers’ experience. Included in CUSTOMERfirst are Leadfusion’s latest advances: Cross Channel Selling for multi-channel sales and lead management and the RESPONSE Interface for next-generation, multi-device UI/UX.

CUSTOMERfirst is a Software-as-a-Service (SaaS) solution for quick implementation and convenient ongoing operation. And with continuous optimization through Leadfusion Advisory Services included in all CUSTOMERfirst product licenses, clients can leverage the very best in financial services marketing and selling practices. With Leadfusion and CUSTOMERfirst, financial institutions can increase revenue by investing in customer experience.

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About Leadfusion, Inc

Leadfusion has been providing compelling experiences for financial consumers since 1995. Over 300 financial institutions, including 8 of the top 10 banks, and more than 75 credit unions have trusted Leadfusion to educate and empower their consumers.