

Leadfusion Announces Availability of Cross Channel Selling

Streamlining Multichannel Conversions for Financial Consumers

San Diego, CA (October 3, 2013) – Leadfusion launches its latest innovation, Cross Channel Selling, a financial product sales solution that drives conversion across channels. By seamlessly connecting and unifying the self-service online and collaborative offline experiences for consumers evaluating financial products, Cross Channel Selling provides financial institutions with a means to bridge the experience gap for consumers as they naturally move between channels.

Cross Channel Selling responds to existing multi-channel behavior by allowing consumers to start their financial product consideration process anywhere and finish anywhere, easily transitioning between channels throughout the process without losing their work. “Consumers using Cross Channel Selling are empowered to move across channels and devices with their relevant informational resources and product information coupled with the sales guidance they need to make financial decisions,” said Matt Kojis, Senior Product Manager at Leadfusion.

For financial institutions, Cross Channel Selling accelerates the purchase process by delivering continuing calls to action that ensure consumers remain engaged as they switch between channels. Commenting on this feature Mr. Kojis said, “Whether the consumer starts their evaluation in self-service mode online or in collaborative mode in a branch or on the phone, Cross Channel Selling stays with them until they are ready to convert, reducing traditional channel switching attrition.”

Financial institution branch and call center staff benefit from Cross Channel Selling’s best practice sales and lead management tools. Cross Channel Selling increases the quality and consistency of the sales consultation delivered by front-line financial service representatives by transforming the financial institution’s site into a powerful collaborative tool when used in the presence of front-line staff. Working together with the consumer, branch and call center staff use online best practice dialogs to guide the process of evaluating a financial solution. Cross Channel Selling includes the ability for financial service representatives to capture contact information, schedule follow up activities, deliver personalized emails and rate updates, and send summaries of the products evaluated with relevant supporting collateral. When the consumer is ready, they can seamlessly take the next step with a pre-populated application in any channel.

Cross Channel Selling is the latest addition to Leadfusion’s Financial Experience Management® (FEM) suite of products. The FEM suite consists of Researching, Marketing, and Selling Solutions designed to operate independently or as a single integrated platform. Patent-pending FEM solutions accelerate conversion, turning prospects into customers and customers into loyal advocates.

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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 trust Leadfusion to educate and empower their consumers.