

MITEL

# NuPoint Finance

## SERVICE AND SECURITY THROUGH TECHNOLOGY

Financial organizations today operate in a dynamic environment. Critical market forces such as increased competition, deregulation and globalization are causing many institutions to re-think their entire approach to doing business. Competition means dealing with a shrinking customer base coupled with an increased consumer demand for services. Deregulation and globalization are also driving the search for new products and value-added services. At the same time, many organizations are dealing with mergers and acquisitions, requiring multiple large institutions to blend and operate as one.

### **THE NUPPOINT MESSENGER™ SERVER—DESIGNED FOR FINANCIAL SERVICES.**

The NuPoint Messenger (NPM) server is a highly reliable communications server designed to help your growing organization address today's challenges and prepare for tomorrow's opportunities with a wide range of voice and fax solutions.

The NPM server is based on industry standards and compatible with all PBX systems. In addition, support for the Voice Profile for Internet Mail (VPIM) standard lets NPM servers work seamlessly with other VPIM-enabled servers from other vendors. Now your users can exchange integrated voice mail and fax messages, 24 hours a day, 7 days a week—throughout your organization and around the world.

NuPoint Messenger's familiar telephone user interface (TUI) is based on a single-letter mnemonic, such as "P" for Play, "D" for Delete, or "A" for Answer, making it easy for users to learn and remember.

Flexible, feature-rich applications can be customized to meet your organization's unique needs, and the NPM server's modular design lets you select the applications you need today then expand your system cost-effectively as your goals and requirements change.

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### *Additional Application Ideas*

#### **BROKER ACCESS FOR VIP INVESTOR**

Allows a preferred customer to enter an unannounced key and have NuPoint Messenger™ find his or her preferred broker.

- Caller can locate broker on a cellular phone, at home number or on pager, regardless of location contact can be made immediately.
- All telephone numbers remain confidential.

#### **FINANCE CONNECTION**

Powerful compound voice and fax messaging for finance employees.

- Saves time and increases communication with remote offices.
- Internal users can view and process their voice and fax mailbox on their PC screen for easy message management.
- Broker and client can easily exchange vital information at the touch of a keyboard or by voice.

#### **EMERGENCY CONTACT**

Provides notification of an emergency to a designated team either through paging or cellular phones.

- Distribution lists are pre-set, saving valuable time.
- Cut down response time to meet market opportunities and time restraints.
- Increase probability of getting a very rapid response to requests by offering cascade type escalation.
- Increase effectiveness and productivity of personnel.

#### **MAIN CONNECTION**

Provides workers in a common area with limited telephones to share an extension. Callers who reach the shared extension are given the option to leave a message for a specific employee.



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- Each employee has a private mailbox.
- Saves resources for limited use mailboxes.

## MOBILE INVESTOR

Temporary and/or permanent guest mailboxes can be created for clients requiring frequent information flow.

- Allows clients to send messages to bankers, investment analysts or brokers any time of the day or week and to receive responses on the advisor's own voice.
- Finance industry advisors can also send reminder messages to individual clients to send funds, review investments or as a reminder for scheduled appointments.
- Broadcast messages can be sent to all guest mailbox subscribers announcing new programs, services, etc.

## MARKET PROMOTION

This solution is a front-end to an automated attendant application. Callers reach the main telephone line of a bank, brokerage house or other financial institution and hear a greeting that informs callers of new services, programs, or special information.

- Greetings are easily customized to rotate from day to day or with every new caller.

## SEND MONEY

This solution automates the process of reminding clients to send in funds for regular investments such as IRAs, SEPs or KEOGH retirement accounts. It is more personable than mail and commands greater attention.

- Saves broker's time and client's can rely on scheduled reminders.

## BROKER ACCESS

Automated call answering and call routing 24 hours a day, 7 days a week.

- Allows callers to route their own calls using dial-by-name directories.
- Reach individual staff members quickly.

- Use menu options to reach specific departments or information mailboxes.
- No waiting until "working hours" to leave a message.

## HAPPY STOCKS

This solution automates the process of reminding important or continuous investors of necessary periodic portfolio tune-ups.

- Can be programmed to call any time 24 hours a day, 7 days a week.
- Schedules can be customized and varied according to broker's needs.

## LOAN BY PHONE

Callers can apply for a loan by answering pre-recorded questions.

- All pertinent information required to process a loan application is captured with an easy to follow form, 24 hours a day, 7 days a week.
- Responses are recorded and collected in a transcription mailbox to be accessed later by staff.
- Cuts down on valuable staff time.

## MARKET CAST

Automated notification of changes in market conditions or investments status.

- Pre-recorded top transactions or news items of the day.
- Saves communication costs via internal intranet.
- Saves time by automating communication.
- Revenue generator as a subscription service.

## INFORMATION ACCESS

Information dissemination via voice and/or fax.

- Extends your marketing reach to be able to communicate with customers 24 hours a day, 7 days a week.
- Never misses a potential loan or credit customer by providing easy, convenient access to lending information and applications.
- Increases employee job satisfaction because time is dedicated to higher level tasks that require personal attention.
- Allocates human resources cost-effectively.



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