



Teller Referral Assistant highlights real-time referral and data quality opportunities to increase teller referral success

Teller Referral Assistant

The Quest Teller Referral Assistant™ helps tellers increase referral activity by generating quality referrals based upon customer banking behavior.

Tellers have the opportunity to interact with more customers than any other employee within your bank or credit union. Although a teller's primary job is to provide fast, friendly and accurate processing of customer transactions, a teller is in a unique position to assist in making product and service recommendations to help customers meet their financial goals.

The Quest Teller Referral Assistant solution helps tellers increase referral activity by generating quality referrals based upon banking behavior and transaction interactions. The application interfaces directly with core banking teller applications such as those provided by Fiserv, Metavante, Fidelity Information Services, Open Solutions, Harland, Jack Henry and others.

Product Features:

- ▶ **Consolidated Customer View** - As a teller processes a transaction, Teller Referral Assistant displays a consolidated customer relationship view. This allows the teller to better relate to each individual customer.
- ▶ **Automatic Relationship Building Leads** - Leads are presented to the teller to prompt a short discussion with the customer. Each relationship lead is triggered based upon customer behavior rules customized for your bank or credit union.
- ▶ **Data Quality Leads** - As customer data quality is an important factor in accurately serving your customer, Teller Referral Assistant identifies data quality issues such as missing phone numbers, emails and invalid addresses and corrects them on your core banking system.
- ▶ **QuickClick Referral** - Tellers don't have time to manually write down referrals on paper. With Teller Referral Assistant, your tellers can create a QuickClick Referral with just two clicks of the mouse. Each referral is tracked to completion.
- ▶ **Custom Automations** - Automations help simplify multistep processes such as address changes or other activities requiring many steps core banking screens to complete. Custom automations simplify the process and improve accuracy resulting in higher customer satisfaction.



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