



New Fiserv White Paper Shares Opportunity, Best Practices for Cross-Selling via Mobile Banking

BROOKFIELD, Wis.--(BUSINESS WIRE)-- Sibos Stand B09 – [Fiserv](#), Inc. (NASDAQ: FISV), a leading provider of financial services technology solutions, today released a white paper that outlines how financial institutions can leverage the mobile channel as a sales platform. Titled, “[Sold! Cross-Selling in the Mobile Channel](#)”, the white paper discusses how financial institutions can promote and cross-sell products and services via mobile banking to increase wallet share and strengthen customer relationships.

Bank of Ireland and Fiserv will also share insights on this topic in the session “The Perfect Pair: How Bank of Ireland Married Marketing and Mobile Banking” at the Open Theater at Sibos 2014 in Boston on October 1 at 4:15 p.m. ET.

To capitalize on growing mobile usage, many retailers and social media organizations are leveraging the mobile channel as a sales platform. Financial institutions can reap similar benefits by cross-selling their own products and third-party products through their mobile banking services.

A mobile sales strategy demands the right tools, technologies and insights, including:

- **In-session Banner Ads**—In-session banners promote a product or service while the user is conducting other business within mobile banking. Dynamic messages presented via banner ads can enable customers to learn more about a product, click-through to call the bank or view external offers.
- **Actionable Insights**—Insights about a customer’s financial situation can be used to personalize the mobile cross-sell experience with targeted recommendations, often called “actionable insights.” If the accountholder has a high checking account balance, the message might recommend opening a savings account for a better return.
- **Static Content Pages**—Links to product pages can boost awareness and are an effective sales technique if the pages are optimized for mobile, with simple design and concise content.
- **Live Chat and Messaging**—Customers are accustomed to secure chat and live messaging through social media, and integrating chat and messaging into mobile banking presents the opportunity for an efficient, effective customer service experience.
- **Push Notifications**—Pop-up notifications provide a way to present highly targeted messages such as relevant product suggestions based on demonstrated need. If a

customer who has demonstrated responsible use of credit is approaching the limit on their card, they can be sent a notification offering an increased limit.

Optimizing channel communication is critical for meaningful exchanges between financial institutions and customers. In the white paper, Fiserv provides additional insight into how financial institutions can tailor digital processes into quick, actionable steps suitable to the unique characteristics of the mobile channel.

The paper also discusses selling third-party products through the mobile channel.

“The mobile channel offers banks and credit unions an unprecedented opportunity to deliver a personalized experience and connect customers with the products and services they need, right when they need them,” said Steve Shaw, vice president of strategic marketing, Digital Channels and Electronic Payments, Fiserv. “A solid strategy for cross-selling via mobile banking can increase revenue, grow wallet share, and strengthen customer relationships, boosting the ROI of the mobile channel.”

Additional information can be found in the white paper, “[Sold! Cross-Selling in the Mobile Channel](https://www.fiserv.com/cross-sell-mobile)”, at <https://www.fiserv.com/cross-sell-mobile>.

About Fiserv

This year, Fiserv Inc. (NASDAQ: FISV) celebrates 30 years of leadership in financial services technology. As one of FORTUNE® magazine's World's Most Admired Companies, Fiserv is helping clients worldwide achieve best-in-class results by driving innovation in payments, processing services, risk and compliance, customer and channel management, and business insights and optimization. For more information, visit www.fiserv.com.

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