

*Any User. Any Data. Any Deployment.*

Enterprise  
Solutions



Customer Self-Service Reporting Applications built with Actuate deliver account information over the web directly to customers to reduce call center and printing costs, increase customer satisfaction and improve revenue.

With Actuate, companies can integrate all of their customer account data in real time and provide the information in an intuitive and easy web experience that is always available, to ensure satisfaction and encourage 100 percent adoption by a global customer base.

## Give Customers Options

Customers have higher service expectations than ever, and if these expectations go unmet, competitors are at the ready. Customers want more control over their accounts. They want to choose how they receive account information: in the mail, online or over the phone. They expect 24x7 information availability. To maintain satisfaction and stay competitive, firms must continue to make interactions and service a better, more convenient experience.

### Why Web Self-Service Hasn't Delivered

Half of all web customer service transactions need to be completed over the phone due to poor presentation, complexity of use and unsatisfactory information delivery. (Gartner)

When customers cannot easily obtain the information they need in a central place, when they need it, they have a poor experience. They are unlikely to adopt self-service solutions, or worse, their disappointment can lead to defection.

For many companies, information is their primary product so poor-quality presentation compromises the brand itself. Companies can meet customer needs and improve the perception of value by following a few principles:

- *Statements generated by different channels or departments should present the same information in the same formats, styles and layouts. Reports should look consistent across print, web and email to prevent customer confusion.*
- *Customers often use their account information to make important decisions. To do so, they need to see the right information at the right level of detail—neither too broad nor too specific. If the information is irrelevant or too sparse, the customer will be frustrated.*
- *Customers want easy-to-use tools and options that will help them manipulate and analyze data to work through projections and derive value from their reports. If its functionality is too limited, customers will not see the application as a helpful resource.*
- *Web users have come to expect 100 percent availability and reliability from their favorite web sites, regardless of time, location or traffic. If the self-service application is down, users will move on to more costly service channels or may abandon the interaction altogether.*

### Why Web Self-Service Initiatives Fail

- *Inconsistent presentation*
- *Difficult to use*
- *Poor-quality appearance*
- *Too much or too little information*
- *Unreliable*

When web self-service initiatives are well-executed and meet expectations, customers use them. The more customers adopt the application, the more it can deliver cost savings and revenue opportunities.

### Reduce Costs

Customer Self-Service Reporting Applications built with Actuate reduce the costs traditionally associated with providing account information, including staff costs, materials, training and other operational expenses as well as the high cost of printing and mailing statements.

- *Email and phone queries each cost \$4.50 on average*
- *Web-based customer queries cost \$.50 on average*

—Gartner

### Increase Retention

Meeting customer needs with new services and high-quality information delivery increases customer retention. With Actuate, customers get exactly the information and services they want, presented as they want them, fostering loyalty.

- *Acquiring new customers can cost five times more than satisfying and retaining current customers.*
- *A 2 percent increase in customer retention has the same effect on profits as cutting costs by 10 percent.*
- *A 5 percent reduction in customer defection rate can increase profits by 25–125 percent, depending on the industry.*

—American Society for Quality

## Drive New Revenue

With Actuate, companies can deliver Self-Service Reporting Applications that customers find valuable and enjoy using. The applications can increase per-customer web site visits, resulting in more transactions and improving awareness of new products or services. Furthermore, because customers are no longer as reliant on agents and account managers for account status information, customer-service staff are freed to focus on cross- and up-sell activities.

## Actuate for Customer Self-Service Reporting Applications

Actuate-based Customer Self-Service Reporting Applications encourage 100 percent customer adoption worldwide by integrating data sources in real time, providing the information customers need in an intuitive and easy experience, and assuring high performance and availability to hundreds of thousands of users.

### Integrated Data for a Single Version of the Truth

Actuate applications deliver consistent information from a variety of sources and customer-service systems and are designed to fit into any customer-service channel mix. Actuate applications provide real-time access through a single report to:

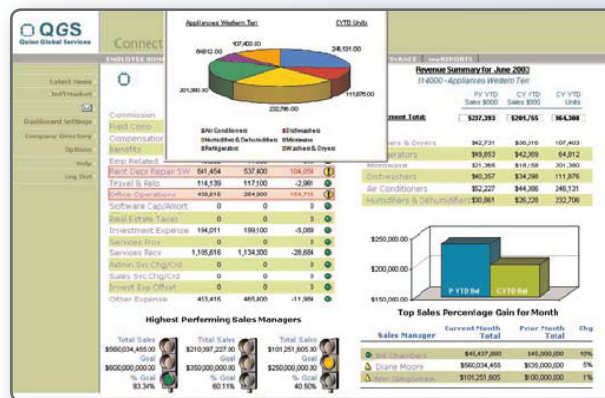
- ERP systems such as SAP, PeopleSoft, Oracle or custom
- CRM applications such as Siebel
- Packaged or custom data marts and data warehouses such as Teradata, SAP Business Information Warehouse and PeopleSoft Enterprise Warehouse
- Legacy applications and offline Excel files

Actuate-built applications integrate seamlessly with web portals and can act as a single source of data for call centers, live chat and email. With integrated information from data sources and service channels, customers are assured the account status they are viewing is complete and current.



### Intuitive Self-Service Experience for 100 Percent Customer Adoption

Actuate reporting applications present information in a familiar, consumer-oriented web environment, with consistent, high-quality formatting, personalized data views and the right tools for each user.



The Actuate e.Spreadsheet Option enables you to deliver business data as versatile e.Spreadsheets in users' browsers.

**Familiar web portal interface**—Information is delivered in a familiar, easy-to-use web experience with navigation, hyperlinks and search tools that compare to the most popular consumer web sites. The easier the application is for customers to use, the faster and more widely it will be adopted.

**Common report presentation**—In addition to online, Actuate reports can be delivered in print or via email. Actuate provides a central reporting infrastructure that assures reports look consistent regardless of delivery medium. Customers are assured a cohesive brand experience that is reinforced with each account status request.

**Picture-perfect reports**—Because information is the product, Actuate applications deliver attractive, high-quality reports that evoke the highest quality of service and foster the perception of value.

**Personalized views and tools**—Customers enjoy a personalized service experience. Secure reports can be viewed by account, by date, by transaction or any other parameter with filters to present only the information the customer wants. Customers are also equipped with decision-support tools that allow them to better understand and analyze their account data.

### Advanced Reporting and Analysis outside the Firewall

- **Click and drill to details**—*Start at a summary report of all accounts, drill into specific accounts, and then drill down on transactions to look at details such as date, time, transaction method and other pertinent information.*
- **Set parameters**—*Hone in on a few key accounts or items in an account report for deeper analysis. For example, compare dividends earned by different accounts over time.*
- **Sort, filter and rank**—*Control the items in a report and the order in which they appear, to meet personal preferences.*
- **Ad hoc query**—*Search for a specific item or set of items and review them in a report format.*
- **Fully functional spreadsheets**—*Work within dynamically generated spreadsheets with current account data and perform light “what if” analysis within a familiar Excel interface.*
- **Dashboards**—*Review a summary report that graphically highlights key account indicators such as overdue amounts, low balances or holdings that have reached a threshold.*

### Reliable Service to Global Customer Base

Actuate’s customers ensure total reliability to hundreds of thousands of users around the world, giving them the information they need at any time, no matter where they are.

**High scalability**—Actuate boasts unparalleled benchmarks around report generation, distribution and support for concurrent users. Reporting applications can be hosted across a heterogeneous server environment, allowing companies to support more users, in more geographies, and to provide customer self-service functionality to multiple departments, all at a lower cost per user.

**High performance**—Users do not waste time waiting for information. Actuate-built applications are designed to take full advantage of hardware and software resources, with multi-threaded processing for heavy volumes of concurrent activity, and on-demand report viewing so only requested pages get delivered over the network, as opposed to an entire report.

**High availability**—Actuate features such as hot backup and failover in case of a server outage ensure there is no single point of failure. As a result, customers worldwide enjoy 24x7 access to Customer Self-Service Reporting Applications built with Actuate.

## Actuate Product Overview

Leading organizations rely on Actuate's Enterprise Reporting Application Platform to develop and deploy intuitive, self-service, customer- and employee-facing applications.

Actuate enables the secure and reliable distribution of information to a large number of users within and beyond the firewall, while giving IT total control over data infrastructure and access.

**Develop**—Actuate's object-oriented, visual development environments provide complete programming flexibility. Developers can use both Actuate's programming language and/or simple, intuitive graphical designers to quickly build Enterprise Reporting Applications.

**Deploy**—Actuate's unique architecture leverages a common infrastructure and shares hardware to allow businesses to seamlessly and cost-effectively add applications and users as needs expand.

**Experience**—The Actuate Application Experience provides a user interface that is intuitive like Yahoo!, adapts to the familiar look and feel of existing applications and imposes no limits on presentation. Users gain access to any data, tool, or format through a single application view, and are ensured current data and personalized views of that data.

## Customer Self-Service Reporting Application Examples

Customer Account Reporting	Client Portfolio Reporting
<i>Cross-industry reports that put more immediate control over account information and status in the hands of customers</i>	<i>Provides web portal-based access to investment statements for any kind of investor or investment</i>
<i>Insurance claim status reports that present multiple claims and payment histories in a single report</i>	<i>Investment portfolio reports that monitor balances, transfers, positions and comparisons, investment trends and history by month, quarter, year or any time period</i>
<i>Media subscriber reports that track subscription information, including expiration date and payment history</i>	<i>Retirement portfolio reports that track variable annuity trends, fixed annuity performance and immediate annuity accounts</i>
<i>Bank, loan and credit account reports that allow users to view graphical summaries and drill down to itemized account details</i>	<i>Cash management reports that track cash reserves, foreign exchange rates, foreign account balances and transaction status</i>
<i>Rewards program status reports (air miles, etc.) that provide information on customer point systems within the customer web portal. Reports can display purchase thresholds that would entitle customer to discounts, free services, service upgrades, etc.</i>	
<i>Utilities account billing reports that provide current information on payment status and service usage</i>	
<i>Service-level agreement reports that track performance delivered against service-level commitments or contracts</i>	