

XEROX®

Technology | Document Management | Consulting Services

Promotional Transactional

Financial Services Application Brief

Cross over to real cross-selling power.



Promotional
Transactional





Make a stronger statement by adding targeted promotional messages.

The Opportunity

Thanks to breakthrough technology, you can transform a mission-critical expense—printing portfolio statements—into a revenue-generating opportunity. By combining finely targeted marketing messages with the obligatory customer statement, your monthly customer billing cycle can be transformed into a monthly customer promotion.

Go from mundane to money-making.

Full-service financial services companies offer many different kinds of investment products to their customers—yet few customers get all their investment products from one firm. That’s why this industry provides the perfect opportunity for upsell and cross-sell promotions that reach every customer. People have different investment needs based on their age and life situation—now you can offer them the specific products that meet those needs, and increase your opportunities every time you send a statement.

With every statement, financial services companies can:

- Increase revenue:
 - upsell or cross-sell products and services
 - sell ad space to valued business partners
- Educate customers about new products and services
- Eliminate warehousing costs for preprinted shells and stocks
- Cut postal expense through combined direct-marketing and statement mailings
- Strengthen relationships with customers
- Set your company apart from the competition

The Xerox Advantage

For decades, companies have turned to Xerox to print high volumes of transactional statements within tight print windows—with the confidence of full document integrity. Now we can merge our transaction solutions with marketing creativity, to deliver promotional transactional documents with the speed and accuracy customers have come to expect from Xerox.

“Mining” the data.

Your company’s databases hold valuable information about each and every customer: investment history, product and service preferences, demographics, and the length of the relationship. Why not put it to work to build your business? Now you can leverage that customer knowledge to craft a more personal, more impactful promotion—and integrate it with your monthly statement to generate a recurring revenue opportunity: the promotional transactional document.

Document design and workflow.

The key to effective marketing messaging is document design. In this example, Exstream Software’s Dialogue™ document automation software delivers simple, yet stunning, document layouts without compromising printing efficiency. It integrates transactional data with layouts from popular graphic design programs—ensuring creative effectiveness and maximum impact to achieve your goals for both the statement and the marketing message.

A single, comprehensive solution.

Fully integrated with Xerox technology solutions, Exstream’s Dialogue allows you to design, develop, maintain, and output fully personalized and consistent communications of all types for delivery in high-volume print/mail and real-time, service-oriented production environments. The Dialogue platform easily fits into diverse IT environments, streamlining document processes and workflows by automating manual steps and eliminating point solutions with its flexibility and depth of functionality.

Financial Services Promotional Transactional Example

Variable Promotional Copy based on customer demographic

Variable Photo based on customer demographic

Charts and Graphs

Statement Information

Transactional Financial Statements printed in monochrome, highlight color, and full color

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Choice of industry-leading digital printers.

In our example, we output to a Xerox iGen3® Digital Color Press, Xerox DocuTech® HighLight Color System, and a Xerox Nuvera® Digital Production System—state-of-the-art full color, highlight color, and monochrome digital production printers.

Xerox offers more than 40 printers that deliver the highest image quality and the most productive printing. These printers are tightly integrated with industry-leading feeding-and-finishing solutions from Xerox business partners.



Exstream's Dialogue software and the Xerox FreeFlow® solutions for color and monochrome technology combine to integrate transaction data with creative design layouts for maximum impact.

Production Notes

Production Hardware:

The full-color version was produced on a Xerox iGen3 110 Digital Color Press. The two-color version was produced on a Xerox DocuTech 128 HighLight Color System. The monochrome version was produced on a Xerox Nuvera® 120 Digital Production System and a DocuPrint® Continuous Feed Printer. A Xerox FreeFlow Print Server (controller) was used as the digital front end.

Media:

The three recommendations for printing the portfolio statement are:

- Xerox Digital Color Silk 100 lb. Text
- Xerox Graphic Expressions True White 24/60 lb. Bond/Text
- Xerox Color Expressions +32 lb. Text

Finishing:

- Folding and mail insertion



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