AXIS NAVIGATOR

...enabling visionary MRM performance

Features & Benefits

- Displays a 360° view of the client in the Navigator Client Workspace to ensure Customer Service Representatives (CSRs) have all the information they need to properly serve the needs of the client
- Provides multiple launching points with one-click drill-through access to operational functions, past activity and client details, streamlining front-line processes and improving CSR productivity
- Presents CSRs with real-time Dialog Topics to assist with the notion of 'next best offer', facilitating cross-selling and up-selling opportunities, as well as strengthening client relationships through conversation about topics of interest
- Question of the Day lets you collect targeted information from the client, contributing to a 360° view of the client and giving your club the ability to accurately and quickly measure and track MRM success metrics
- Textual pre- and post-transaction scripts allow CSRs to improve the quality of the client interaction, while NavActions embedded in some scripts allow CSRs to complete associated Market Basket transactions as efficiently as possible
- Recording past client activity ensures your CSRs are well equipped to continue a conversation that would have begun during a prior interaction, empowering them to ensure appropriate follow-up after a request, complaint or sales activity, or to strengthen and personalize the relationship with the client

Designed with clubs for clubs, Navigator is a multi-faceted Member Relationship Management (MRM) tool, which empowers your Customer Service Representatives (CSRs). With Navigator, your club will enjoy expanded services and sales, improved member retention and strengthened client relationships. NavActions will significantly increase productivity of front-line staff, enabling them to focus more attention on the member rather than the task.

Empowering Your Customer Service Representatives

Navigator's Client Workspace gives your CSRs a 360° view of each individual client, allowing them to deliver consistent and relevant customer service and build client relationships. Navigator Client Workspace (NCW) offers a three-tiered snapshot of client information from past activity (including transactions from all business lines), current information (such as membership status, coverage information and balance owing), and most importantly, new opportunities (which are presented to CSRs as intelligent Dialog Topics and timely, club-driven Promotions).

Intelligent Dialogs

Navigator's Dialog Topics are real-time hints which help guide and personalize the CSR's conversation with the client. Based on qualification rules, this intelligent and context-sensitive prompting allows CSRs to engage clients in meaningful dialog about opportunities which are expected to be highly relevant to the client. Dialog topics simplify the cross-selling and up-selling process, allowing CSRs to focus on supporting the club's overall MRM strategy. Recognizing the dynamic and ad-hoc nature of client interactions, CSRs who need more guidance can access additional (more general) Dialog Topics with one click.

Dialog topics appearing in NCW can be applied to all clients from a qualified list provided by a marketing analyst, or compiled on-the-fly, based on pre-defined criteria. All forms of Dialog Topics can be governed by Qualification Rules. These rules ensure perpetual relevance regarding what CSRs can and should discuss with clients at any given time. Qualification rules can be table-driven, meaning the criteria is defined, structured and managed by clubs themselves. These rules allow for granular transactional and demographic parameters to be applied at both a household and individual client level. For increased control and decreased redundancy, rules can be nested within other rules. The combination of these capabilities and increased self-sufficiency allows clubs to be exceptionally responsive and efficient in the area of Dialog topic management.

Meaningful Contact Management

Navigator goes beyond just displaying passive past client transactions—with Navigator, CSRs have the ability to record new interaction activities, facilitating active relationship building with the client. New data is quickly and intuitively captured to ensure seamless processing of sales or requests. Any client requests requiring follow-up are assigned to the appropriate club resource and Navigator automatically creates a diary task to ensure prompt and visible follow-up. The historical record of all transaction and client interactions becomes part of an invaluable data store, supporting advanced customer analytics.

Navigation

Navigator Client Workspace encapsulates the entire user environment into a centralized navigation launch point by letting clubs define NavActions. NavActions are shortcuts to regular and customized AXIS functions, to internal and external web pages, or to third-party applications. Supporting multiple navigation methods for optimum usability, CSRs launch NavActions from customized navigation menus along the top or left of the workspace and from hyperlinked data elements within NCW. For example, to process pay-as-is transactions quickly, clubs could create a NavAction that launches the Membership payment window immediately after a CSR clicks on the (hyperlinked) member's balance owing shown in NCW.

Customized Views

Navigator Client Workspace offers comprehensive, customizable views of a client profile that includes support for all three critical areas of the relationship:

- ✔ **Past Activity:** All previous client interactions that incorporate both AXIS and third-party transactions are optimally sorted with drill-through capabilities to quickly and easily view details of any past activity.
- ✔ **Current:** This information typically includes, but is not limited to elements such as: primary and associate member information, membership status and expiration date, balance owing, contact information, Lifetime Value and Affinity Dollars.
- ✔ **Future:** Navigator uses sophisticated functionality to provide CSRs with relevant dialog cues designed to steer the relationship in a deliberate direction. These can include targeted promotions and prioritized dialog topics for potential sales opportunities, or helpful reminders to reinforce AAA/CAA membership value.

With the click of a button, NCW's customer-centric view can be toggled between details for a specific individual and the entire household.

Flexible in its design, Navigator is browser-based and capable of running without the AXIS client. While the non-AXIS version is primarily offered for inquiry purposes, it is extremely valuable for users who typically do not use AXIS. What's more, clubs can customize the overall look and feel of NCW to meet their unique interface requirements.

Security

The Role-based security system adds numerous features, allowing you to control which users can see NavMenus and NavActions through security groups, record AXIS sessions with the Build Security Session, maintain security groups and security entries workspace, launch security inquiries, and more.

Scripting

Navigator's scripting features ensure that CSRs have the knowledge and tools required to perform transactions – including cross-selling of products and services – in a manner consistent with the club's overall business plans and strategy. Navigator lets you associate pre- and post-scripts or prompting text with any NavAction or transaction performed by CSRs in NCW. Devised by marketing strategists within the club, these scripts display helpful information and related opportunities that go together. You can also use scripts to emphasize internal procedures, business policies and practices or alerts. Scripts can even link to other NavActions to let your staff navigate to functions that are appropriate for the client's needs.

Promotion & Campaign Management

Navigator Client Workspace provides CSRs with visibility of promotions that may have been offered to the given client. You can also associate NavActions with a promotion so that CSRs can quickly and easily launch a related transaction when they receive a positive response from the client.

Question of the Day

NCW features a Question of the Day area for collecting client feedback through targeted mini surveys that contribute to the 360° view of that client, and the collective view of your entire membership. The data captured through Question of the Day helps measure your club's MRM success metrics, such as Net Promoter Score (NPS). Having this real-time client feedback drives awareness from both the club's and the client's perspective – the club gains greater insight about the client's concerns, satisfaction levels and other factors, while the client learns more about the club's products, services and incentives.

Related Product Sheets

- NavBase
- Client Feedback
- Promotion Response Tracking

AXIS MEMBERSHIP RELATIONSHIP MANAGEMENT SUITE

Integrated Solutions. Integrated Minds.