



Terafina Launches Version 4.0 of Omni-Channel Digital Sales Platform

Full Visibility of Customer Relationship Enables Clients to Connect Online, Empowers FI Associates and Executives with Comprehensive, Real-Time Engagement Tools

SAN FRANCISCO – April 26, 2017 – [Terafina Inc.](#), provider of loan application and deposit account opening solutions for the retail financial services industry, today announced that Version 4.0 of its omni-channel sales and service-to-sales platform is ready for deployment at banks and credit unions across the country.

Data-driven rather than forms-driven, the Terafina solution brings consistency to the customer experience, no matter which channel the customer happens to use at any given time. The enhanced Version 4.0 of the [Digital Sales Platform \(DSP\)](#) from Terafina includes unique service-to-sales capabilities to convert service requests from current customers into new sales. DSP 4.0 also includes an improved self-service status portal that makes it easier for customers to interact with their financial institutions (FI's) across all delivery channels including online, voice, and branch.

“This latest release Service to Sales Module transforms the FI’s typical Servicing Call Center into a customer’s Financial Need Management Center. Our solution would significantly improve servicing center operating efficiency and will empower a servicing rep to effectively identify and meet customers’ financial needs in one call. We have had many inquiries and requests during the past year about our omni-channel solutions. The market is demanding that financial institutions serve them in precisely the consistent manner that our DSP enables them to perform,” said Terafina CEO Meheriar Hasan.

According to [McKinsey and Company](#), 65% of customers interact with their banks through multiple delivery channels. Inconsistency across channels is a primary source of customer dissatisfaction and churn. Financial institutions need a unified reporting platform that delivers a comprehensive, real-time 360-degree view of the entire customer relationship to all employees, from call center and branch staff to senior managers and executives. Such a platform enables employees to convert these service-related interactions to new sales. Terafina delivers that unified experience with DSP.

“Being data-driven rather than forms-driven sets Terafina apart from the pack. Most solutions consist of an application for a single product, and once that is filled in, the FI tries to cross-sell from there. It makes the customers conform to the FI’s operating model,” continued Hasan.

“But with Terafina, as customers pick the products they want, Terafina dynamically builds their application in real time whether they are online, using a mobile device or talking to an FI representative. It launches a smooth workflow path and makes the ongoing interactions between customer and the FI quicker, with less need to call to check status or to refer customers to other departments.”

About Terafina

Terafina (www.terafinainc.com) provides omni-channel sales solutions to the banking, credit union, and consumer lending markets. Terafina is based in San Francisco and has offices in Atlanta.

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