

Insights Assist

Access Key Metrics and Data to Understand Consumer Behavior



Making informed decisions requires access to meaningful data. Insights Assist from Fiserv offers the data and analytics necessary to align your business strategies with accountholder preferences. Armed with deeper insights about consumer banking behaviors, you can increase engagement and drive brand loyalty.

Insights Assist delivers the data you need to understand how consumers are using electronic payments products and target consumer segments with relevant marketing campaigns to drive deeper relationships. It is a cost effective reporting suite that offers clear visual insights into a variety of critical metrics. Insights Assist is accessed through Client Connect from Fiserv, an easy-to-use web portal with an intuitive user interface.

Three service tiers are available: Essentials, Self Service and Custom.

Essentials

Insights Assist: Essentials provides complimentary reports and a monthly dashboard as part of your relationship with Fiserv. Frequently used data and key metrics deliver a clear view of electronic payments activity trends. With up to 400 standard reports, you have access to the data that means most to your business.

This tier includes a product data trends dashboard that displays month-over-month key performance indicators (KPIs) for electronic payments products. The dashboard can be used as a quick reference tool for tracking metrics by product. Utilize product data trends to identify which metrics require additional analysis and understand the impact of processing days.

Self Service

On-demand reporting gives you the flexibility to create and manipulate your own reports. Insights Assist: Self Service currently provides two data subject areas – payment analysis and subscriber activity:

- **Payment Analysis**

Use payment analysis reports to gain insight into how consumers are using bill pay, including frequency of use, payment volumes, top payees, types of payees and potential ebills, so you can make better informed business decisions. With payment analysis, you can pull data and create personalized reports to:

- Identify cross-selling opportunities by payment industry (credit card, mortgage, loan)
- Identify top 25/50/100 payees by payment volume, payment amount or number of makers submitting a payment
- Track monthly activity by dollar amount threshold
- Identify areas of growth, such as ebill adoption



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• Subscriber Activity

On-demand subscriber activity reports make it easy to view detailed subscriber activity data in a format that works best for you. Use subscriber activity reports to:

- Reconcile invoices
- Support business analysis, marketing and data mining at the subscriber level
- Manage engagement by analyzing active and inactive (dormant) subscribers based on their last payment and enrollment dates

Custom

Insights Assist: Custom answers your unique questions by giving you a deeper level of data and insights tailored to your specific needs. Custom reports are developed for you by Fiserv and can be delivered once or on a recurring basis. This tier helps you report on data beyond what you get through Essentials or Self Service and includes:

- Custom and ad hoc extracts
- Analytics engagement
- Consulting services

Key Benefits

- Access key metrics and data trends quickly and easily
- Understand consumer activity and behavior
- Increase engagement and adoption of electronic payments products
- Identify cross-selling opportunities

Connect With Us

For more information about Insights Assist, call 800-872-7882, email getsolutions@fiserv.com or visit [fiserv.com](https://www.fiserv.com).



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