

Connect.

BoldChat™ Live Chat Software

About BoldChat.

Credit unions are known for the quality service they provide, whether it's in your lobby or over the phone. Shouldn't that same level of service be offered through your online branch— your website—as well? With our BoldChat products, you can provide that same level of service to members who want to reach you via your website.

- **BoldChat Basic** - BoldChat Basic is the perfect combination of power and simplicity. With full visitor monitoring, summary reporting, button/window customization and invitation capabilities, Basic adds immediate value to any website at a very affordable price point.
- **BoldChat Pro** - BoldChat Pro is one of our most popular products because it includes the tools and data necessary to optimize live chat for maximum benefit. If your credit union is serious about using live chat as its own sales/support channel, has experience with live chat software, or has grown beyond the basics, Pro is the right solution.
- **BoldChat Premier** - Our most dynamic live chat offering, BoldChat Premier is perfect for large membership credit unions with high website traffic that want to build an efficient and cost effective live chat operation to handle MSR member support as well as new sales/member acquisition.
- **BoldCCM SMB Suite** - The SMB Suite is perfect for fast moving, agile and progressive credit unions that need a full-featured live chat solution that deploys easily. If staff members of your organization play a wide variety of roles or routinely multi-task, the SMB Suite is flexible enough to accommodate multiple workflow scenarios and powerful enough to enforce changing operational processes; BoldCCM's live chat, click-to-call, email management, and active co-browsing can all adapt as your need requires.
- **BoldCCM Enterprise Suite** – For organizations that want a leading edge enterprise level live chat solution which can adapt to their changing needs. BoldCCM Enterprise is both powerful and transparent. Organizations will quickly learn how to customize the solution to meet their needs and optimize performance. BoldCCM's live chat, click-to-call, email management, active co-browsing, and full remote control capabilities are fully integrated into the industry's most intuitive interface.

Benefits of BoldChat.

Enhance Member Service

- Member care is always important, and in some cases it can be the deciding factor for potential members. With BoldChat you can provide the one-on-one support your members appreciate and deserve. At times when you are not actually in the office to answer calls or even during regular business hours, you can provide live support.
- While any member will appreciate your online availability, studies show that younger people are already using website live chat on a regular basis. Having a live chat solution will help you assist this growing market by using one of their preferred communication methods. Using this technology can also help you attract and retain these members who are in a key age range for borrowing.



- The live chat feature is available during your normal business hours and gives you one more way to increase the level of service you provide your members — by reaching them the way they choose. After hours, your members can use the feature to send emails with their questions for the MSRs to respond to the next day.

Increase Sales

When dealing in sales (of loans, for example), human interaction can go a very long way. While browsing the products and services listed on your site, your members may have questions that they need answered before they make a decision. With BoldChat, you can answer those questions and your members won't have to leave your site or pick up a phone.

Reduce Costs

Some of the major costs of running your credit union include phone, fax and staff. With BoldChat, you can use these less, lowering your operational costs.

Product Comparison Chart.

Product Highlights	BoldChat Basic	BoldChat Pro	BoldChat Premier	BoldCCM SMB Suite	BoldCCM Enterprise Suite
Major Functionality Areas					
Chat	■	■	■	■	■
Passive browsing sharing	■	■	■	■	■
Reporting engine & scheduler		■	■	■	■
Active browser sharing with agent controls/form fill		■	■	■	■
Email Management				■	■
Click-to-Call				■	■
Remote control					■
Supervisory dashboard					■
Individual Live Chat Features	■	■	■	■	■
Customizable buttons and windows	■	■	■	■	■
Proactive chat invitations	■	■	■	■	■
Push pages, spell checking, & typing indicator	■	■	■	■	■
Searchable canned messages	■	■	■	■	■
iPhone access	■	■	■	■	■
Real-time visitor monitoring	■	■	■	■	■
128-bit SSL encryption	■	■	■	■	■
Post chat survey & email transcript	■	■	■	■	■
Skill and department based chat routing		■	■	■	■
Salesforce® integration module			■	■	■

Features.

- **Passive Browsing Sharing** – This feature lets chat operators anonymously follow along as website visitors move from page to page.
- **Reporting Engine and Scheduler** – BoldChat is optimized with versatile and easy-to-read reports on visits and chat interactions along with the scheduling option to have the information you need delivered automatically.
- **Active Browser Sharing with Agent Controls/ Form-fill** – Lets chat operators initiate a live co-browsing session with website visitors. During the session, operators can control the prospect's browser, highlight areas of interest, and assist with form-filling.
- **Email Management** – The integrated email management functionality allows credit unions to manage their emails in BoldChat. Effective tools allow credit unions to organize and assign their email along with collaboration features make this an attractive feature.
- **Click-to-Call** – Allows your website visitor the ease of just clicking on a button to initiate a phone bridge between themselves and one of your staff (MSRs) almost instantly. The representative taking the call has an immediate leg-up before they even say "hello." They will know the caller's name, their website location, their geographic location, if they've ever called before, and more.
- **Remote Control** – As the name implies, this gives chat operators full control over the target computer.
- **Supervisory Dashboard** – A single screen shows a top down view of the entire website communication operation. With text and graphic displays, supervisors can determine at a glance if chat, click-to-call, email, and remote assist queues are being handled optimally. Color-coded, customizable alerts flag items out of range and enable immediate drill down to specifics.
- **Customizable Buttons and Windows** – BoldChat windows are entirely HTML based, which means you have complete control over them.
- **Proactive Chat Invitations** – Ability to target a website visitor and then, using visual cues and coordinated sound effects, to deliberately invite that visitor to engage in a live chat interaction.
- **Push Pages, Spell Checking and Typing Indicator** – Chat operators can direct the visitor's browser to a page of their choosing in a single step.
- **Searchable Canned Messages** – A searchable operator knowledge base is easy to construct with BoldChat's canned messaging capability. Messages can include links, images, font treatments and personalization variables like the chat agent name. Access to the messaging knowledge base occurs through folders, hot keys or keyword searching.
- **iPhone Access** – With the iPhone app, chat operators with iPhones can chat with visitors anytime, anywhere. You'll see a complete and real-time list of visitors currently on site, be able to proactively invite visitors, drill down into visit details to see referring information, and more.
- **Real-time Visitor Monitoring** – Allows credit unions to investigate who's on site and see a complete visit history.
- **128-bit SSL Encryption** – Allows chats to be secure with industry standard 128-bit encryption to keep member communications private.
- **Post Chat Survey and Email Transcript** – Allows chat operators to have Boldchat email the chat transcript to the website visitor. You can also conduct post chat surveys to get some feedback on the chat experience.
- **Skill and Department Based Chat Routing** – The ACD engine (Automatic Chat/Call Distribution) – available in BoldChat Premier and the BoldCCM Enterprise Suite, quickly passes incoming requests to the most appropriate, available chat operator. Administrators use a combination of ACD queuing rules, departments, permissions and foldering to ensure that the right work is distributed to the right personnel in real time.
- **Salesforce® Integration Module** – For organizations that uses Salesforce CRM, the Salesforce integration package automatically sends chat data into your Salesforce instance.

About Us.

CU Solutions Group

CU Solutions Group helps its customers serve, grow and build financial strength by offering solutions that manage strategies pertaining to technology, marketing, membership enhancements and performance management.

Technology Solutions

Technology Solutions is a full-service technology company with solid expertise in Web, mass media, digital, data, programming and more. We help our clients leverage these tools to provide them with unparalleled access to all the resources they need to grow their organization from one source—Technology Solutions.

We are an SAS 70 certified and credit union-owned company that has been serving hundreds of credit unions and credit union organizations nationwide, and their technology needs, since 1996. We worked with an auditing firm to achieve SAS 70 Certification as a result of our commitment to the needs of our clients and efforts to manage our systems securely and effectively.

Technology Solutions offers:

- Web Design & Development
- Financial Education Content
- Automated Applications
- Member Communication Tools

For more information:

To learn more about Technology Solutions and our quality products and services, please:

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