

Why do I want COA™ (Customer Opportunity Advisor) if I already have a CRM system?

CRM systems use a passive “pull” approach. CRM relies on users to decide what needs done and when. It requires many manual steps in addition to, and generally in advance of, actual customer interaction. Workflow is largely at the user’s discretion and accountability is minimal.

COA™, however, is an Opportunity Management solution and produces actionable events that directly translate into efficient business processes. COA™ automatically delivers what your team needs to successfully meet sales and service goals.

If you want to stay competitive and grow your business, you want the focus and timeliness of COA™.

How does COA™ produce actionable events?

Sophisticated analytics combined with fully customizable business rules select the best qualified opportunities. COA™ then distributes those opportunities to the appropriate individual for action and follow-up. Users receive an optimized “to-do” list along with relevant details every day, empowering them to concentrate their efforts and maximize the effectiveness of customer interactions.

How do I know I’m getting the right opportunities?

COA™ leverages data mining and predictive analytics to uncover opportunities by recognizing patterns hidden within your data. In addition, COA™ flexible rules-based decision engine affords you granular control of every type of opportunity.

Some capabilities provided by COA™ are already handled by my core processor or MCIF. Will I still benefit from COA™?

Yes! COA™ is an integrated Enterprise Opportunity Management platform that includes different modules for different capabilities. Modules are activated based on your needs. COA™ supplements core systems, an MCIF or a marketing database, filling functional gaps and introducing an innovative, highly efficient workflow.

In today’s competitive world you need to anticipate customer needs and capitalize on every viable opportunity as it surfaces. The answer is a proactive, automated, optimized solution for opportunity management that does not break the bank, no pun intended. COA delivers advanced analytics, prioritized actionable events, and a unified workflow, all of which are essential for sustained and profitable growth.

How do I track activity around COA™?

COA™ provides a full set of standard reports as well as the ability to produce custom and on-demand reports. Standard reports show performance and system usage statistics across every level including users, branches, departments, teams, positions, and the whole enterprise.

Who needs to be involved with the installation and how long does it take?

ASA works directly with your IT staff and typically COA™ is installed in one day.

How do I get started generating opportunities with COA™?

COA™ includes a startup set of opportunity mining rules that get you up and running quickly. This initial rule library is easily tailored to your specific needs and augmented to include additional scenarios based on your objectives.

How scalable is the system?

COA™ is a complete Enterprise Opportunity Management platform that delivers exceptional service levels and responsiveness. There is virtually no limit on the number of users that COA™ can efficiently serve.

Can I control access to COA™ and control who sees what?

Yes. COA™ accommodates system administrators, managers and end user roles, each of which can be refined further as needed to limit access and control what is viewable. Managers are able see all opportunities for everyone on their teams. End users can be restricted to only see opportunities that have been assigned to them. In addition, all users can be assigned to multiple locations.

How easy it is to train my staff to use COA™?

COA™ was designed by bankers for bankers, so it's intuitive for anyone working at a financial institution. Formal training is provided for system administrators, managers, and end users. Sales training and "train-the-trainer" engagements are also available.

For more information on COA™, [visit](#) or [contact ASA](#)



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