



KIVA ResultsPDQ can help you overcome the common hurdles presented by sales pipelines and more quickly achieve performance goals — all while providing exceptional member service.

A TURNKEY SOLUTION* for MeridianLink LoansPQ® and XpressAccounts® users, ResultsPDQ provides a unified platform to manage pipelines and eliminate bottlenecks, boost staff productivity and achieve better analytics to close more loans and accounts, faster. The sales and service solution provides a robust interface that enables access to LoansPQ pipelines and XpressAccounts activity, cross-qualified offers, outbound calling support, referral and lead management, multiple dashboards with loan and deposit performance measurement, automated follow-up and more!

PRODUCT OVERVIEW

ResultsPDQ™ for MeridianLink®

- **Are your loan applications getting stuck in the pipeline?**
- **Is it difficult to track sales and member outreach activities?**
- **Are you seeking to increase loan growth and deepen member wallet share?**



Eliminate Pipeline Bottlenecks

Seamlessly integrated with LoansPQ and XpressAccounts, ResultsPDQ provides a single platform to manage pipelines from beginning to end. Key features and benefits include:

- Queue management capabilities offer fast insight into current queue, historical queue and loan timeline to help you identify and resolve slowdowns and accelerate opportunities
- Integration delivers up-to-date, actionable information and consolidates data from multiple MeridianLink reports
- Drill-down functionality offers access to performance details, by account and loan, across all branches and individual processors to expedite application processing and loan conversion. Advanced filters offer up to 20 query combinations including branch and employee views

Expand Member Relationships

ResultsPDQ allows your credit union to expand member relationships by leveraging what it knows about each member to present personalized offers, make cross-qualified offers and extend onboarding activities. Additional key features and benefits include:

- Easy member search capability
- Holistic view of each member relationship, including immediate access to current activity, referrals and interaction history gives staff everything they need to create a great experience for members with every interaction
- Tools to quickly capture new opportunities and manage follow-ups ensure staff provides timely and knowledgeable service



Track and Boost Sales Performance

ResultsPDQ delivers standard reports, ad-hoc queries, dashboards and summary reporting, equipping your organization to quickly and accurately assess metrics against goals by ranking, funding and loan detail. Additional key features and benefits include:

- Referral and lead management, workflow rules, routing and escalation capabilities, as well as outbound calling support, expedite processes and improve service
- Ability to track and monitor marketing campaigns, upload personal lead and promotion lists in real-time, as well as view individual scorecards, drives better sales results
- Easy access to insurance information, such as loan protection, debt cancellation, GAP and mechanical, improves staff productivity



“KIVA’s ResultsPDQ facilitates data access, retrieval and analysis, giving LoansPQ and XpressAccounts users not only comprehensive views of sales performance and service activities, but also the tools to take action to optimize results.”

– Doug Glagola, VP, enterprise solutions, MeridianLink

KIVA ResultsPDQ is a SaaS solution, but it can also be deployed on premise as a module of the KIVA Respect™ suite. ResultsPDQ equips your credit union with sophisticated CRM functionality and delivery capabilities, such as channel centric workflow, that can either be the foundation of a multi-channel CRM/CEM strategy or complement your existing CRM system.

For more information, to request a demo or to get started maximizing your MeridianLink investment today, please contact your MeridianLink representative or info@kivagroup.com!



QUESTIONS?
FEEL FREE TO CONTACT US.



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