



## **KIVA Group Unveils ResultsPDQ™ Software for MeridianLink® Customers**

*New Solution Provides Banks and Credit Unions Using LoansPQ® and XpressAccounts® a Unified Platform to Manage Pipelines and Track Sales and Service Activity*

**SAN ANTONIO, Texas – August 29, 2017** – [KIVA Group](#), a premier, omnichannel CEM/CRM software provider to banks and credit unions, unveiled today ResultsPDQ, a sales and service product for financial institutions using MeridianLink’s LoansPQ and XpressAccounts solutions. Seamlessly integrated with MeridianLink, ResultsPDQ provides a unified platform to manage pipelines and eliminate bottlenecks, boost staff productivity and achieve better analytics to close more accounts and loans, faster.

KIVA Group and MeridianLink, developer of the financial industry's first multi-channel loan and new account origination platform, integrated KIVA Group’s Respect™ customer interaction applications with the LoansPQ and XpressAccounts software as an initial step in their partnership. ResultsPDQ represents the latest milestone in the companies’ shared mission to help community and regional financial institutions capture new sales opportunities and cultivate customer and member relationships through exceptional service.

“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,” said Doug Glagola, vice president, enterprise solutions, MeridianLink. “KIVA and this new product are in lock step with MeridianLink’s strategy to continually create and deliver end-user value that helps clients reach new heights of efficiency and profitability.”

ResultsPDQ extends LoansPQ and XpressAccounts functionality, giving banks and credit unions the ability to:

### **Eliminate Pipeline Bottlenecks**

- Queue management capabilities provide fast insight into current queue, historical queue and loan timeline to help organizations identify and resolve slowdowns and accelerate opportunities, as well as prevent customers and members from seeking alternative sources
- Integration provides up-to-date, actionable information and eliminates manual efforts to consolidate 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

### **Expand Relationships**

- Easy customer and member search capability
- Holistic view of each customer and member relationship, including current activity, referrals and interaction history gives staff everything they need to present highly personalized offers and make cross-qualified offers from LoansPQ and XpressAccounts, as well as extend onboarding activities
- Tools to quickly capture new opportunities and manage follow-ups ensure staff provides timely and knowledgeable service

### **Track and Boost Sales Performance**

- Standard reports, ad-hoc queries and dashboards provide comprehensive insight into account and loan performance by ranking, funding and loan detail
- Easy access to insurance information, such as loan protection, debt cancellation, GAP and mechanical, improves staff productivity
- 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

“KIVA ResultsPDQ empowers financial institutions to not only overcome the common hurdles to pipeline management and sales tracking, but also nurture customer and member relationships through highly personalized and responsive service,” said Tina Baker, director of business development, KIVA Group. “ResultsPDQ is a turnkey solution for MeridianLink LoansPQ and XpressAccounts users interested in driving deposit and loan growth, increasing customer and member wallet share and achieving faster loan conversion.”

KIVA Group is demonstrating ResultsPDQ in Booth #621 at the Symitar Education Conference (SEC) and TechConnect in San Diego this week. To learn more about the product and/or request a live demo, contact [info@kivagroup.com](mailto:info@kivagroup.com).

### **About KIVA Group**

KIVA Group is a global provider of customer interaction and experience management software for financial institutions. The Company’s CRM/CEM, unified sales and service, and unified delivery channel solutions help institutions create a consistent, personalized experience for customers—with every interaction. The KIVA Respect™ open technology platform and multichannel applications connect customer, product, sales and service information to give institutions an unprecedented ability to manage the whole customer relationship. With KIVA’s software, organizations gain access to the current and historical interaction information they need – across multiple data sources – to provide exceptional service as well as identify and capture new sales opportunities. For more information, visit [www.kivagroup.com](http://www.kivagroup.com).

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