

Title (en)
A METHOD AND SYSTEM FOR EVALUATING CUSTOMERS OF A FINANCIAL INSTITUTION USING CUSTOMER RELATIONSHIP VALUE TAGS

Title (de)
VERFAHREN UND SYSTEM ZUM EINSCHÄTZEN VON KUNDEN EINER FINANZINSTITUTION UNTER VERWENDUNG VON KUNDENWERTKARTEN

Title (fr)
PROCEDE ET SYSTEME POUR L'EVALUATION DES CLIENTS D'UN ETABLISSEMENT FINANCIER, A L'AIDE D'ETIQUETTES DE VALEUR DES RELATIONS AVEC LES CLIENTS

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Application
EP 98942010 A 19980818

Priority

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Abstract (en)
[origin: WO9909503A1] A computerized method and system for evaluating customers (12) of a financial institution using customer relationship value tags associated with customer treatment actions (6) includes automatically analyzing information about a customer from a database (2) of the financial institution by a customer assessment engine (4) using a predefined statistical model to assess the value of the customer (12) to the financial institution (10). The assessment engine (4) extracts the customer data necessary to create customer tags, segments the customer population using the tags, and assigns the appropriate customer treatment actions (6). The customer treatment actions information (6) is then accessed by other financial systems of the financial institution (14, 16, 20), or by customer representatives of the financial institution (18), and the associated customer treatment action is implemented by such systems or representatives (14, 16, 18, 20) in dealing with the customer (12).

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- See references of WO 9909503A1

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