
HELPING CEE BANKS SELL

sellea

EXPERT SELECTION OF LEADS

Architecture Overview and Technical Requirements

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Prepared on: August, 2013

Version: 1.2

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About the Document

This document represents an overview of SELLEA architecture and provides a detailed technical requirement for its installation.

What is SELLEA?

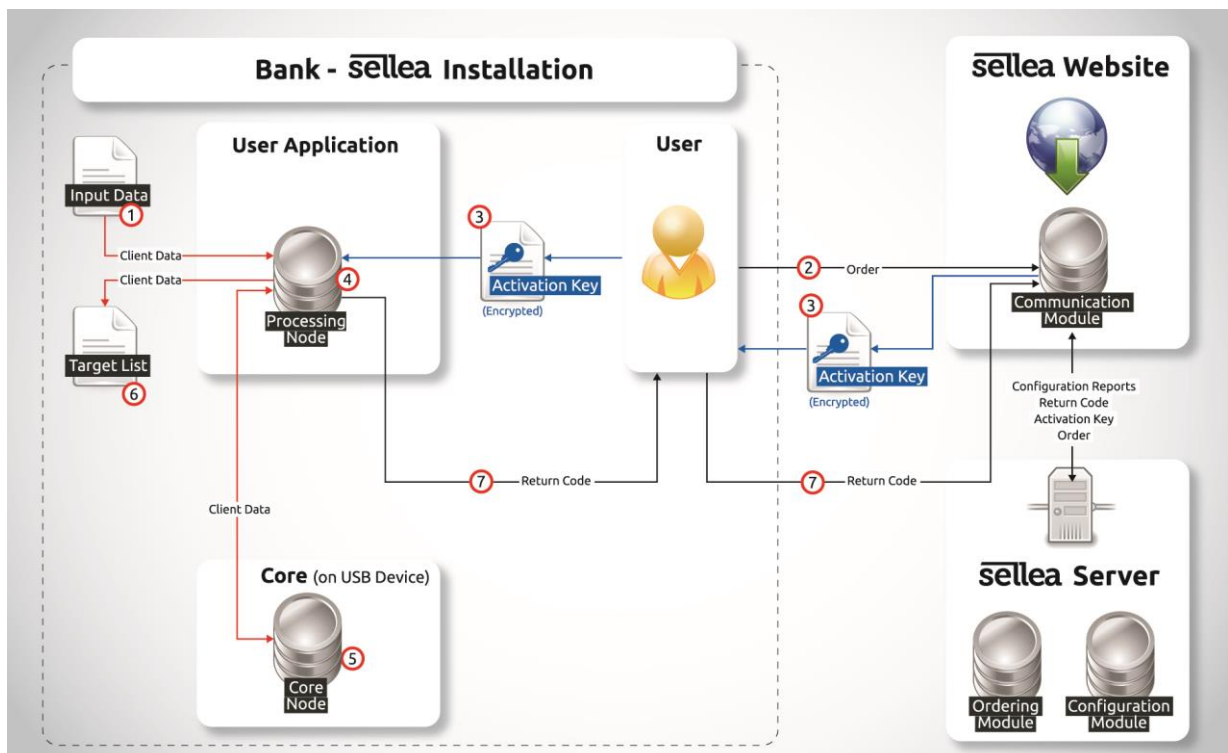
SELLEA is an Expert System which immediately selects most likely buyers among bank’s clients („Leads“) for a specific offering of a bank product. It requires minimal IT engagement and does not demand any analytical capabilities from the bank. Hence, it is delivering a sales tool that provides quick returns from controlled and affordable investments.

SELLEA is a service provide by TrimTab. It is not software. The installation at the Bank remains in property of TrimTab. The Bank does not acquire the right to use SELLEA software other than in instances when TrimTab is commissioned to deliver its target-list selection services. It is only installed at the Bank as a mean for TrimTab to provide the commissioned services.

Architecture

SELLEA is a system which is divided into two distinct parts: 1) the installation at the Bank and 2) ordering on the SELLEA portal.

Such separation of functionalities allows full confidentiality of Bank’s client data.



① Input Data

Input Data contains individual client data in a pre-defined format. This data is used both during the configuration process and for the actual Lead selections. The only client identification on the file is an ID which may be either the actual system ID (Customer ID) or an internal Bank key (Customer RK). Target-lists containing selected leads will bear the same identification as found on the Input Data. See document a) Input Data Dictionary for detailed data requirements.

② Orders

SELLEA generates target-lists for specific banking product and services. The User places an order into the Communication Module at the SELLEA website specifying the Sales Objective (banking product) and the desired number of Leads to be selected into the target-list.

③ Activation Key

Each time an Order is made the SELLEA Ordering Module creates an encrypted Activation Key and delivers it to the User through the Communication Module. The User imports this Activation Key into the Processing Node which decrypts it and executes the selection process. The Activation Key is a file which contains instructions for the SELLEA Processing and Core Nodes and includes the number of Leads to be selected per Sales Objective for which the Target List is to be created.

④ Processing Node

Processing Node (jointly with 7 - Core Node) performs the selection of Leads and creates target-lists. It requires access to the Input Data but it DOES NOT require access to the SELLEA Website as all Bank configuration parameters are supplied in the Activation Key.

⑤ Core Node

Core Node (jointly with 6 - Processing Node) performs the selection of Leads and creates target-lists. Majority of the Expert System logic is contained in the Core Node. The Core Node is installed as an USB device which is supplied by TrimTab. The work-station or a server on which SELLEA is installed requires a functional and available USB port for SELLEA to function. This device remains in property of TrimTab and the Bank is required to return it as defined in SELLEA contract. The bank reserves the right to destroy the USB device before returning it to ensure data confidentiality.

⑥ Target List

Target List is a file which contains Leads (selected likely buyers among bank's clients) for a specific Sales Objective.

⑦ Return Code

In cases when SELLEA does not find the required and paid-for number of Leads to be included in the target-list, the Bank is credited with the missing number of Leads to be used in future orders. The Bank receives this credit when the User uploads the Return Code to the SELLEA Communication Module. The Return Code is generated by the Processing Node.

Technical Requirements

In case the bank is using the Monthly Subscription approach, TrimTab supplies the required equipment (PC only) and the only technical requirements are:

- Externals (keyboard, mouse and screen)
- Functional & available USB port
- Internet connectivity for the SELLEA user (Internet connectivity is not required for the SELLEA installation itself) - Means for the user to transfer Monthly Subscription Activation Keys from the SELLEA web site

In case that bank decides to buy SELLEA only as the need arises instead of monthly subscription work station on which will be SELLEA installed should be prepared by the bank.

Technical requirements for the successful deployment of SELLEA are the following:

- Windows 7 x86/x64
- 2 gigahertz (GHz) or faster
- 64-bit (x64) processor
- 8 GB or more RAM
- At least 5GB of available disk space (depending on the size of Input data files)
- .NET framework
- Functional & available USB port
- Internet connectivity for the SELLEA user (Internet connectivity is not required for the SELLEA installation itself) - Means for the user to transfer Activation Keys and Return codes to the SELLEA web site