

Party Routing Profile (Capability)

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1. Role Definition



The customer profile service domain is used to tune the customer experience during any real-time interaction with the bank. A collection of status indicators, ratings and alerts can be maintained that are then used to influence the routing and servicing decisions that govern the customer interaction. For example a status indicator could include a warning that the account is in distress which would limit sales activity and might result in routing a contact to a specialist account recovery servicing facility.

2. Example of Use



The identity and active status of a customer is checked as they present themselves on-line to access their bank account

3. Executive Summary



This service domain maintains a small profile of key indicators for a customer that is referenced during customer interactions to facilitate routing, servicing and product/service fulfillment decisions. This can include status (such as account in arrears), ratings (such as high value customer) and alerts (such possible fraud activity detected)

4. Key Features

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- Track and provide customer status flags (e.g. in arrears)
- Track and provide customer ratings (e.g. credit rating)
- Track and provide customer alerts (e.g. possible fraud activity)

Documentation

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Properties

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Property	Value
Service Domain	
API BIAN Portal	Party Routing Profile API (https://app.swaggerhub.com/apis/BIAN-3/PartyRoutingProfile/12.0.0)
Core Business Object	
Individual Analytics	partyMeasurementAccumulators partyMeasurementActivityAnalysis partyMeasurementPerformanceAnalysis partyMeasurementTrends&Events
Portfolio Analytics	partyMeasurementPortfolioActivityAnalysis partyMeasurementPortfolioMake-UpAnalysis partyMeasurementPortfolioPerformanceAnalysis
Scenarios	<div><div><div></div><div></div></div> Process Internal Upsell Campaign (views/view_55064.html) <div><div></div><div></div></div> 1b - Retrieved ASPSP Account Information Trigger NBP (views/view_54959.html) <div><div></div><div></div></div> Execute Interactive Retention Campaign (views/view_55098.html) <div><div></div><div></div></div> Perform Customer Product Matching and Selection (views/view_55621.html) <div><div></div><div></div></div> Handle Request for Product Support (views/view_55511.html) <div><div></div><div></div></div> Execute Internal Campaign (views/view_55350.html) <div><div></div><div></div></div> Conduct Relationship Development Planning (views/view_55535.html) <div><div></div><div></div></div> 2 - Customer Sees the NBP Offer and Decides if to Apply (views/view_55585.html)</div>
Service Role	Maintain a small amount of current customer status data to identify and influence any real-time operational interaction for sales, servicing and/or fulfillment (e.g. high value, eligible for campaign, account suspended, open Case)
BIAN Life Cycle	

Registration
Status

Registered

Stereotypes

stereotype

ServiceDomain

Appears on



(views/view_50878.html)



BIAN Coreless 2.0 Wireframe

(views/view_51135.html)



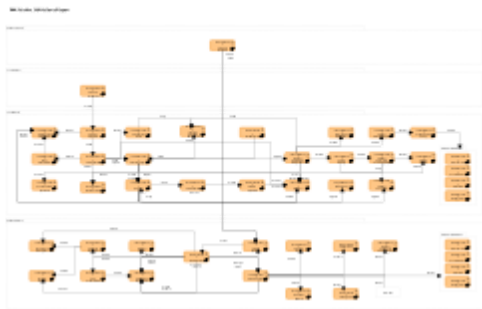
Party Routing Profile SD Overview

(views/view_51552.html)



External Access Framework

(views/view_51594.html)

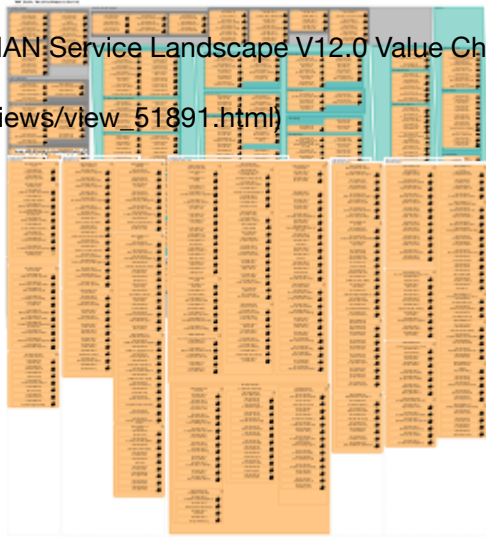


BIAN Coreless 3.0 Wireframe

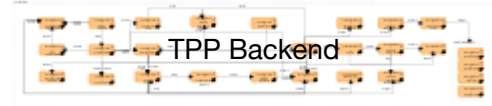
(views/view_51705.html)

(views/view_51723.html)

BIAN Service Landscape V12.0 Value Ch...
(views/view_51891.html)



BIAN Service Landscape V12.0 Matrix Vi...



Relations



aggregated
by



External Access Framework (object_25.html?object=127286)



Party (object_25.html?object=131261)



Wave 1 (object_25.html?object=153747)



Cross Channel (object_25.html?object=171776)



TPP Backend (object_25.html?object=83605)

associated
with



Information Event (object_26.html?object=58021)

gets input
from



Customer Relationship Management (object_21.html?object=30437)



Business Unit Management (object_21.html?object=30964)



Customer Offer (object_22.html?object=39968)



Party Authentication (object_22.html?object=40912)



Contact Handler (object_20.html?object=41839)



Lead and Opportunity Management (object_22.html?object=45446)



Session Dialogue (object_23.html?object=48273)

is equal to































Party Routing Profile (object_36.html?object=31559)

is part of





Party (object_25.html?object=131261)



realized by







-  Party Measurement_ Analytics Object (object_25.html?object=110962)
-  Regenerate In/Out Parameters for all SQs at the level of BQs: Status BQ, Rating BQs, Alert BQ (object_30.html?object=121137)
-  Change SD name "Customer Profile" to "Party Routing Profile (object_30.html?object=145861)
-  Create a new SO "Notify Status" at the level of Status BQ (object_31.html?object=161676)
-  Party Routing Profile_SD_Operations (object_19.html?object=218575)
-  Party State_Reporting (object_19.html?object=218582)
-  Party State_Invocation (object_19.html?object=218584)
-  Party State_Instantiation (object_19.html?object=218605)
-  Party Routing Profile_SD_Service Group (object_19.html?object=240356)
-  Re BQ Retrieve details about alerts for a party (object_12.html?object=29025)
-  Re CR Retrieve details about the monitored party state (object_13.html?object=30704)
-  Party (object_23.html?object=33103)
-  Notify Status (object_14.html?object=35060)
-  Up BQ Update status measures for a monitored party (object_14.html?object=35518)
-  Re BQ Retrieve details about status measures for a party (object_14.html?object=35547)
-  Re BQ Retrieve details about rating measures for a party (object_14.html?object=36044)
-  Ex CR Execute an automated action for a monitored party (e.g. refresh) (object_14.html?object=37845)
-  Party State (object_24.html?object=38882)
-  In CR Initiate profile state monitoring for a party (object_12.html?object=42369)
-  Ca BQ Capture status measures for a monitored party (object_12.html?object=42571)
-  Ca BQ Capture rating measures for a monitored party (object_16.html?object=43928)
-  Rq CR Request manual intervention for a monitored party (e.g. review settings) (object_16.html?object=44411)
-  Up BQ Update rating measures for a monitored party (object_16.html?object=44516)
-  Co CR Control the party monitoring (e.g. suspend) (object_16.html?object=45256)
-  Up BQ Update alerts for a monitored party (object_16.html?object=45671)
-  Up CR Update monitoring for a party (object_16.html?object=46118)
-  Ec BQ Accept, verify etc. an alert for a monitored party (object_16.html?object=46411)
-  Ca BQ Capture alerts for a monitored party (object_16.html?object=46732)
-  Monitor (object_28.html?object=58090)



sends output
to

-  Customer Product And Service Eligibility (object_21.html?object=36792)
-  Legal Entity Directory (object_21.html?object=37530)

serves

-  Customer Management (object_6.html?object=126743)
 -  Customer to Information Association (object_6.html?object=126751)
-

triggered by		Customer Behavior Insights (object_21.html?object=34917)
		Customer Campaign Execution (object_22.html?object=40236)
		Contact Handler (object_20.html?object=41839)
		Party Reference Data Directory (object_22.html?object=45230)
		Lead and Opportunity Management (object_22.html?object=45446)
		Session Dialogue (object_23.html?object=48273)

triggers		Customer Offer (object_22.html?object=39968)
		Lead and Opportunity Management (object_22.html?object=45446)
