

FINANCIAL MARKETING PROGRAM

WHAT TO DO WITH ALL THAT DATA

Banking organizations and branches want to on-board as many new customers/members as possible and gain their trust for additional business. Acquiring new customers/members is difficult enough, add in the challenge of continued marketing through the presentation of appropriate services and it can be a struggle. Plus, how do you know what actually works?

Through the segmentation/optimization of their collected data, along with the right tools—banks and credit unions can now acquire new customers/members and individually grow them more cost-effectively than ever. This sales & marketing process perpetuates the collection of valuable customer/member data and develops concise customer/member profiles to better target what services are best suited to what customers/members and at what time.

Once a new customer/member is on-boarded, strategic data triggers can be put in place to automatically be sent out to the customer/member to sell additional related services.

- Customer/Member Profiling
- Associated Up-sell Opportunities
- 1:1 Targeted Sales Campaigns



Properly segmented customer/member data lets branches know exactly when a customer/member is entering a logical window for an appropriate new financial service.

We measure everything. We know what worked and what didn't. As this customer/member growth cycle continues, our marketing efforts improve, sales ROI rises and branch smiles grow larger and larger.

ON-BOARDING TRIGGERED CAMPAIGNS

