Delivering personalization at scale

AGILE MARKETING PLATFORM FOR FINANCIAL INSTITUTIONS
Situation in the US - Banks

- Stage 1: starting March 13th - close lobbies to the public. Challenge:
  - 1) inform all customers,
  - 2) promote digital channels
- Stage 2: around March 20th - approval relief packages to clients. Define products, rates, requirements
- Stage 3: right now. Reduce wait times at contact centers and improve response time. Streamline and/or digitize processes for applications/requests/approvals. Move to outbound to proactively address customers' needs and personalize messages.
Prisma Flash

• What: solution to reduce wait times at the call center and improve response times for approvals.
• Why:
  – Benefit for FIs: improve loyalty, reduce operational cost, potentially upsell.
  – Benefit for members: improve customer experience and relationship
• How:
  – a quick to deploy service to: 1) streamline processes, at least partially digitizing them, 2) enable Banks to proactively contact account holders that are needing it the most with pre-approved, relevant relief offers.
  – It includes 6 out of the box outbound campaigns, with their corresponding funnels for online conversion and guidance on how to segment data with propensity models.
• To Whom:
  – existing clients we want to protect
  – clients in the pipeline we want to secure
  – Must be at stage 3 of response to crisis.
6 out of the box campaigns

- Skip a payment requests
- Emergency/relief loans
- Personal loans
- Early withdrawal on investments, break a CD
- Business Loans
- Financial Counseling
Standard Components

– Landing page
– Funnel for digital conversion
– Guidance on how to segment data for outbound campaigns
– Email template
– Ready to integrate with Docusign
– Ready to integrate with text messaging