



Omnichannel cross-selling made easy

Because every customer is unique





The Problem

FI's know what they want:

- #1 marketing objective for FI's in last 5 years*: deepen customer relationships, increase share of wallet.
- Digital channels adoption is constantly increasing: selling through multiple channels is mandatory.
- They have access to lot of valuable data and knowledge about their customers.

But they still:

- Broadcast generic offers to their customer base, reducing chances of engagement and conversion.
- Don't communicate consistently with their customer across different channels, negatively impacting CX.
- Invest a lot of time and resources to run inefficient campaign management processes, with slow feedback loops.



How to improve cross-selling in a complex omnichannel world?



The Solution

Make each client feel special through effective omnichannel marketing campaigns orchestration



Omnichannel

Manage all campaigns and channels from a single place



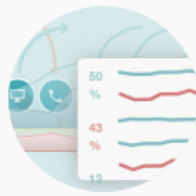
Segmented and personal

Target each customer with the right offer and a personalized message to increase engagement and loyalty



Machine Learning

Use ML algorithms to select the next best marketing action and always present omni-relevant offers



Realtime

Analyze and adjust campaigns in realtime to increase effectiveness



Benefits

Capitalize existing customer relations

Prisma Campaigns uses already existing customer knowledge in a more effective way, enabling relevant and personal marketing communications.

Add value through your campaigns

Transform campaigns into value generating processes for clients. Design relevant, personalized messages, based on client explicit (given) and implicit (behavioral) information.

The right message at the right moment

Offer your clients the products and services that best fit their needs and preferences in a consistent and coherent way across all of the bank's points of interaction.

Improve loyalty and bonding

Design your marketing campaigns as value adding processes and engage clients with relevant, personal communications. You will be nurturing your relationship with them and improving your overall conversion rates.



**Building
long term relationships**



**Improve
share of wallet**



**Increase
loyalty**

Our Customers



What they say about us

“Prisma is all about agility and real-time results. It enables us to run commercial actions at the right time focusing on our customer`s growth. Prisma team’s support and creativity have been the key to turning the solution as the core component of our omni-channel communication strategy.”

Rosa Rodríguez
Business Intelligence Manager – Banco General

“With Prisma, we were able to deploy omni-channel campaigns in less than 6 weeks with a minimum integration effort. We also increased our campaign management productivity 5 times.”

Juan Pablo Traverso
Web & Mobile Unit - BCI Bank



Why Prisma



100% designed for FIs

Understands the Financial Institutions needs including policies, processes and security requirements



True omnichannel marketing

Combines online and offline channels in a 360° approach increasing your customers satisfaction.



Increase Cross-Sell and Upsell

Closes the gap between Sales and Marketing. Boost your ROI by +20% with automated cross and upsell campaigns.



Fits Financial Institutions of any size

Meets the requirements of every single FI, from \$200 million to over \$200 billion in assets.



Best in class API integration

Fast and easy integration reducing adoption cycles. Go live in less than 4 weeks.

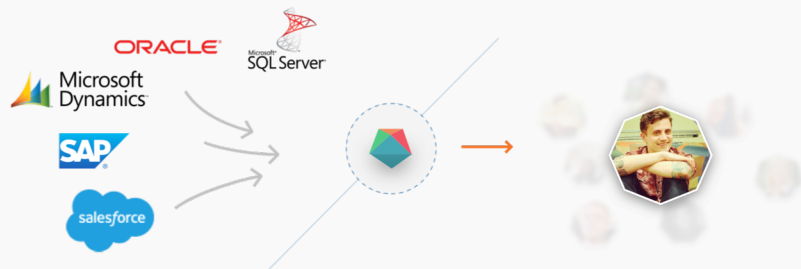
How it works

Define your Segments

| Define your Campaigns

| Orchestrate multiple Campaigns

| Analyze in Real Time



Banks and FIs are sitting on a goldmine of information about their customers. Start by **understanding your clients needs**, interests and behavior in the most effective way.

Prisma Campaigns enables you to leverage all the available information from various sources, such as your core systems, CRM, DW, BI, etc. In addition, it **improves your customer knowledge** by automatically incorporating behavioral data from ongoing and historical campaigns.

Prisma Campaigns consolidates all relevant information from multiple systems and sources in a powerful **Omni-Virtual Customer Profile**. This is a deeper and wider view of your clients that includes their interests, needs, and behaviors.

Segments > Female Older than 40 years

You are creating a Segment based on: Banking_Data.xls

Status: Imported Finished Customers: 1000 Rows: 1000

Demographics: Age, Sex, Family Members,...

The Customer is permanent Resident

The Customer is older than 50 years old

Add other condition

Customer Profile: Accounts, Products, Score...

Uses Product 1, Product 2, Product 3, Product 4

Add other condition

Interaction History: Channels used, Page visits, Previous c

How it works

Define your Segments

Define your Campaigns

Orchestrate multiple Campaigns

Analyze in Real Time

Design relevant, personalized, multichannel campaigns aligning your company products and business goals with the best understanding of your client.

Three simple and intuitive Steps

1

Start by defining name, start and end dates, and target audience for your campaign

Name

Starts

Ends

Campaign Name

25

25

Audience [Add Segment](#)

2

Define how you client will engage in the campaign

1

Leads generator

2

Funnel

OFF

Banners

ON

Automatic Popups

ON

Outbound

OFF

Referral Links

3

And what will happen when the client converts

3

Conversion

OFF

Export CSV

ON

Send to Call Center

ON

Send to CRM

OFF

Update Backoffice

All Campaigns

- 529 College Savings Plans

LIVE



Student Loans

Investing

- Auto insurance Q2 Promotions

LIVE



Car owners

Insurance

California Spring Y17 Home Show

FINISHED



[No Segment], Student Loans, AI

Digital adoption promo campaign

UNPUBLISHED



Students Loads

Commun

First time buyer mortgages

LIVE



Mortgages, [No Segment]

Mortgages

All your marketing campaigns will be stored in a Centralized Campaigns Repository that reflects your bank marketing strategy and business priorities, enabling Prisma to execute and optimize them automatically.

How it works

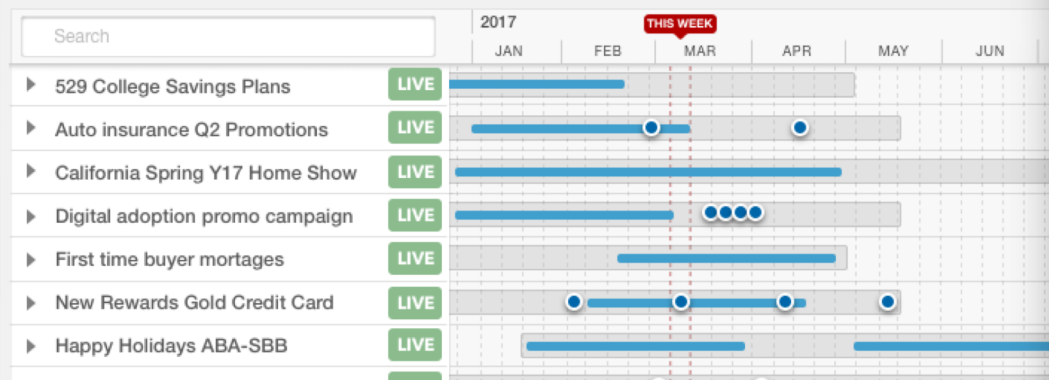
Define your Segments | Define your Campaigns | **Orchestrate multiple Campaigns** | Analyze in Real Time

When it comes to prioritizing several campaigns for each client, you can trust our **NextBestAction** engine to identify the right message with the highest conversion probability for every channel. Prisma Campaigns orchestrates the campaigns in a coherent manner over all the available channels and interaction points, providing a consistent and personal experience to the client.

Prisma Campaigns's **Matching Ranking and Prioritization Engine** matches in real time:

- The client's context (channel, contact point, geolocation, business event, date/time).
- All the information available in the Omni-Virtual Customer Profile at that time.
- All the active campaigns stored in the Centralized Campaigns Repository.

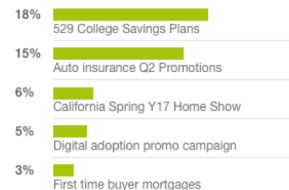
Based on all this information
Prisma Campaigns defines the
Next Best Marketing Action for
each client in their specific context.



Customer Profile					
Full Name	Juan Perez	Email	Male	Socio Economic	The lowest on earth
Phone	555-8437	Birth Date	33 (25/4/1982)	Gender	Female

Top 5 Campaigns to convert (user qualifies)

User might not qualify to these campaigns



Conversion Probability



Conversion by channel



Conversion Probability by Category

How it works

Define your Segments

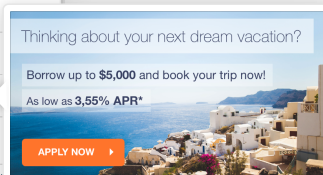
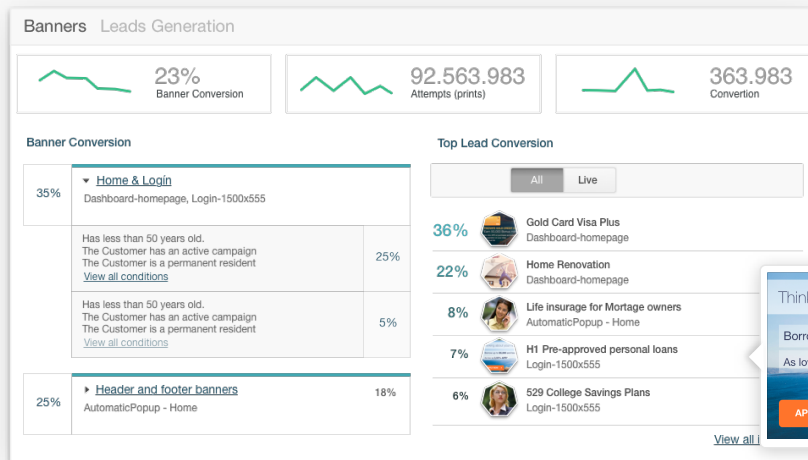
| Define your Campaigns

| Orchestrate multiple Campaigns

| **Analyze in Real Time**

Prisma Campaigns manages all the communication process **from engagement to conversion** on all your digital channels. It also supports the integration of activities from non-digital channels such as visiting a branch to sign a contract or sending hot leads to your contact center.

The **Real-Time Conversion Monitoring Dashboard** enables to continuously evaluate the campaigns effectiveness. By analyzing what is working or what is not working, it's possible to immediately react and refine campaigns without waiting until they finalize.



CUSTOMER JOURNEY

December 28



28/12 || 07:24 AM
www.prismacampaigns.com
7 page views
9 Campaign views
2 Clicked Banners
1 Conversion

User converted.
Loans 40%



28/12 || 06:56 AM
Mail Clicked
Loans 40%



28/12 || 02:24 AM
Mail Opened
Home Improvements 50%! Card Gold Vis...
Sent

December 26

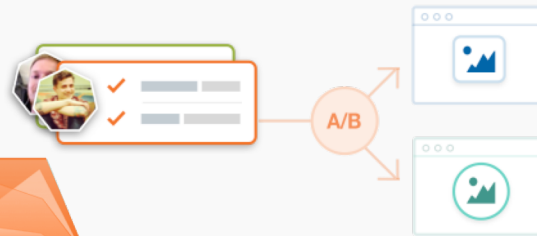
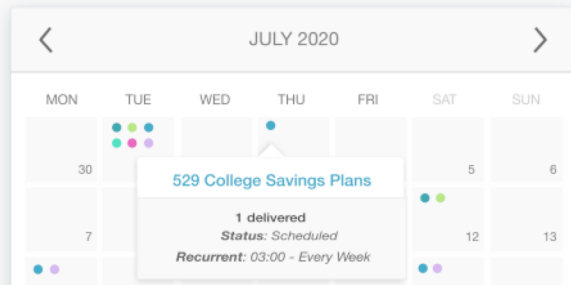


26/12 || 11:44 PM
Opened Mobile App

Features

For the **Marketing Team**

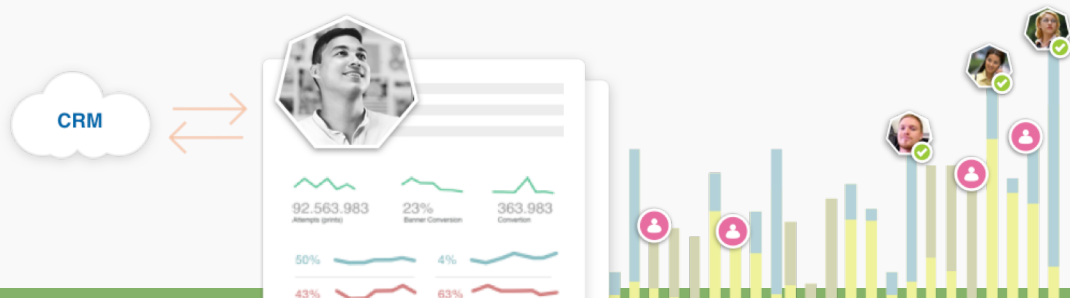
- Centralized campaign repository
- Inbound & Outbound multichannel campaigns
- Web & Mobile banners and popups
- Emails & banners real-time content personalization
- Personalization of messages within the conversion funnel
- Personalization preview at design time
- Marketing Calendar
- A/B Testing on banners, e-mails and funnels
- Predictive ML based campaign & messages prioritization
- Outbound delivery forecaster
- E-mail templates and landing pages
- Dismiss campaign and unsubscribe options
- Simple integration of campaigns on social networks through referral links



Features

For the **Sales Team**

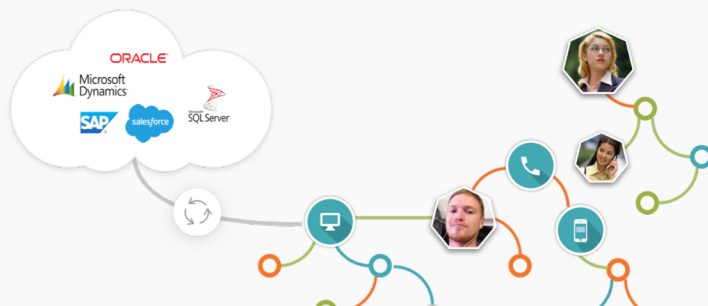
- Audience management through central repository of segments
- Smart targeting based on behavioral information, demographic & other variables
- Predefined high level conditions for simple segment definition
- Manual and automatic import of external segmentation data
- Dynamic addition of new fields to the client's profile
- Multistep conversion & onboarding process (Forms, Conditions)
- Dynamic forms for data capture
- Event triggered campaigns
- Real time campaign monitoring & analysis
- Customer Journey of all client's interactions
- Web Activity Tracking
- Automatic bi-directional Backoffice/CRM data synchronization



Features

For the **Operations Team**

- Easy integration with external data sources
- Software Development Kit (SDK) for cost-effective integration of multiple channels
- REST API based integration
- Funnel extensibility support (add-ins)
- Campaign audit log for change tracking
- Office Channels (ATM, IVR, Branch, etc...)
- Webservice support for Backoffice integrations
- Review and approval workflow for campaign content
- Custom outbound contact policies
- Custom user roles
- Custom user security policies
- LDAP/ MS Active Directory integration



Out of the Box Roles

 **Segment Manager**

■■■■ ■■■■

 **Publisher**

■■■■ ■■■■

 **Designer**

■■■■ ■■■■

 **Security Manager**

■■■■ ■■■■



In Summary

An innovative approach	Designed for FIs needs	With the best ROI
<p>Segmented and personalized campaigns</p> <p>Fully omnichannel</p> <p>Machine Learning based prioritization</p> <p>With Real-time tracking and adjustment</p>	<p>Easy integration and implementation</p> <p>Fast time to market</p> <p>Delivered SaaS or on-premise</p>	<p>Capitalize existing customers relations</p> <p>Increase campaigns conversions</p> <p>Execute effective cross-selling</p> <p>Increase customer share of wallet</p>

