

Data & Marketing Insights

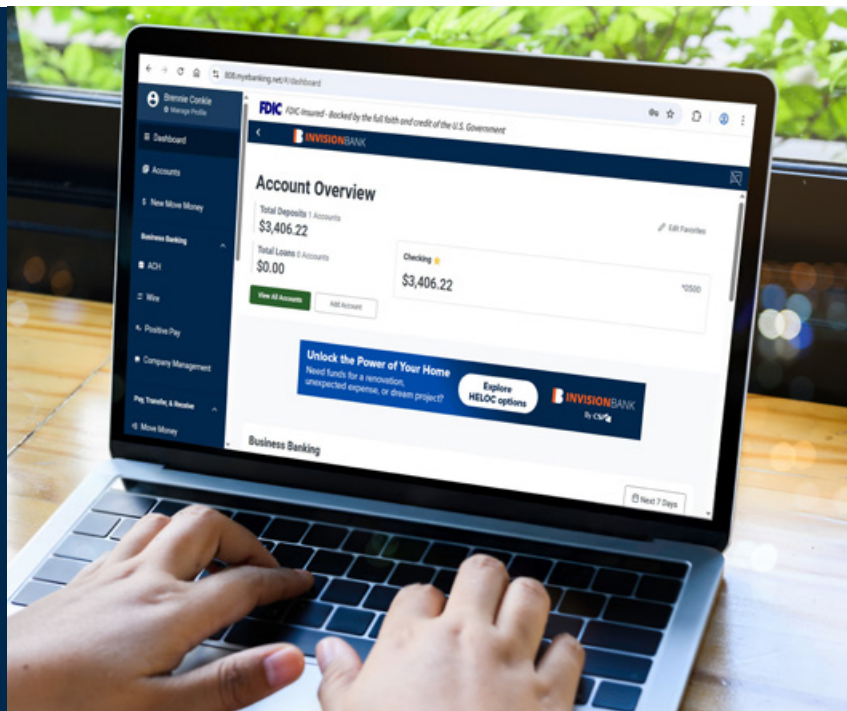


Data Insights | Omnichannel Marketing | Seamless Integration

Data & Marketing Insights for Your Institution

Financial institutions often struggle to fully utilize their data due to limited resources and fragmented information. This results in ineffective decision-making, impersonal customer engagement, and missed growth opportunities.

Our Data & Marketing Insights solution seamlessly integrates with CSI's NuPoint® ecosystem, transforming your account holders' transaction and behavioral data into actionable insights.



Harness Your Data

Your accountholders are telling you exactly what they need—every time they tap, swipe, or log in. With this solution, you gain a 360-degree view of each customer by combining real-time transactional data with behavioral insights. These insights give you the context needed to understand customer motivations, preferences, and financial journeys.

What you can learn about your accountholder:

- Spending patterns
- Channel preferences
- Income and cash flow trends
- Recurring activity
- Savings and loan behaviors
- Life stage clues

Targeted Marketing Campaigns

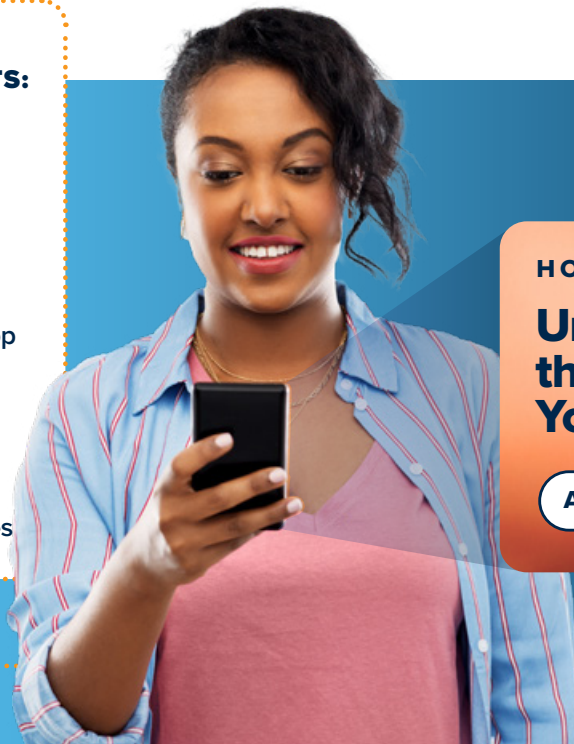
Knowing your customers is just the beginning. The true value lies in using these insights to craft personalized, timely, and relevant experiences across every channel. This solution transforms complex data into clear visuals and actionable next steps—so your team can engage with confidence and context.

Here's how banks are putting insight into action:

- Cross-sell with confidence
- Promote timely financial tools
- Support life stage transitions
- Drive adoption of digital features
- Nurture financial wellness
- Deliver tailored omnichannel campaigns

BEHAVIORAL & TRANSACTIONAL INSIGHTS:

- Dines out 3-4 times per week
- Logs in via mobile app 90% of the time
- Ends each month with ~\$800 remaining in checking
- Subscribed to a budgeting app
- Has a held-away mortgage
- Has an auto loan
- Bill pay user
- Recent baby supply purchases



HOME EQUITY OPTIONS

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the Power of
Your Home**

Apply today!



Turning Customer Insights Into Personalized Experiences

By anticipating your customers' financial journey, you can gain the insights needed to deliver the right products at the right time, boosting operational efficiency and maximizing your ROI in the process.



Understand Customers' Financial Journeys – Gain a 360-degree view of customer behavior, preferences and financial habits, enabling hyper-personalized marketing and product recommendations.



Achieve Higher Marketing ROI – Leverage AI-driven insights to optimize targeting, increasing engagement and conversion rates while reducing marketing spend.



Gain Operational Efficiencies – Automate data collection, segmentation and campaign execution, freeing up internal resources and improving workflow efficiency.



Drive Engagement and Prevent Attrition – Deliver timely and personalized content and offers that resonate with customers' individual needs.



Deliver Omnichannel Content Seamlessly – Engage customers across multiple channels with personalized, consistent messaging that aligns with their preferences and behaviors.

By automating data processing and marketing execution, CSI's Data & Marketing Insights solution empowers financial institutions to deliver targeted, impactful campaigns that drive engagement and maximize ROI.

**Gain a deeper understanding of your customers and turn insights into action.
Request a demo today to see how smarter data can drive real results.**

