



CX24

AUTHENTIC ROOTS. AMBITIOUS PURSUITS.

CSI

DIGITAL

MARKETING



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AGENDA

01 – Overview


02 – Segment Offering

03 – CSI CRM Overview

04 – Targeted Marketing


05 – Q&A and Follow Up

WHAT IS DIGITAL MARKETING?



Digital Marketing
['di-jə-təl 'mār-kə-tiŋ]

The use of digital channels to market products and services in order to reach consumers.

 Investopedia

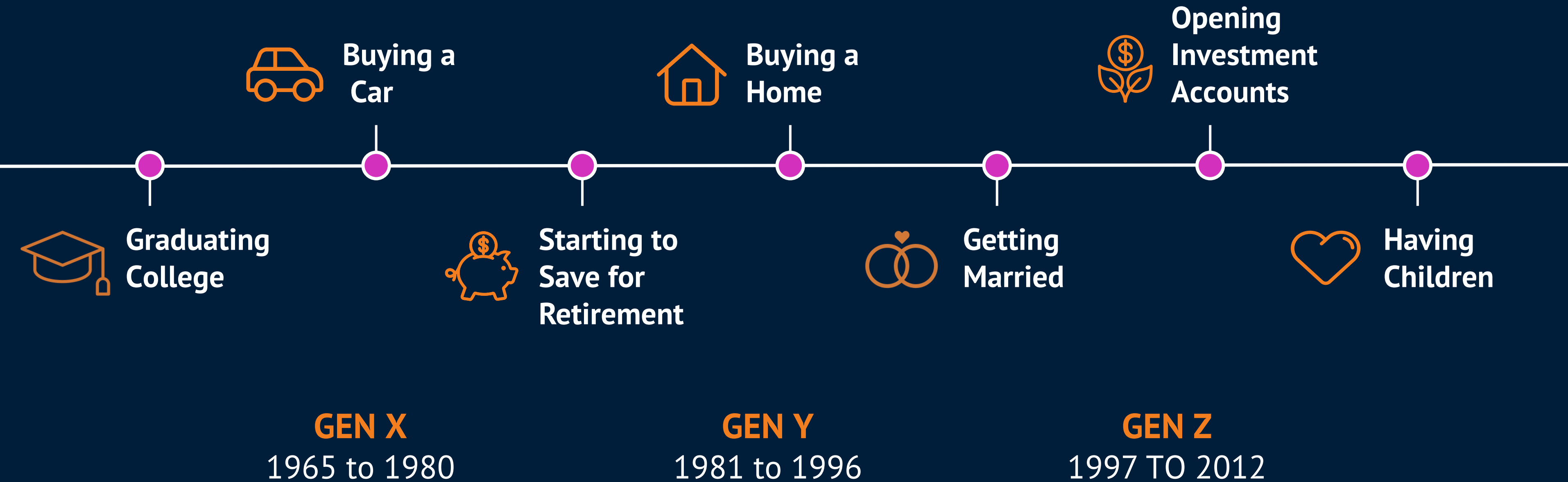
CSI Digital Marketing Offerings

- CRM
 - Email
 - Targeted ads on the web
 - Optional: Segment Key Life Indicators (KLIs)
- Digital Banking
 - Custom Text
 - Secure Digital Messaging
 - Blast Push Notifications
 - Optional: Digital Ad Space Utilizing Segment
 - Optional: Array Offers Engine Ad in Credit Score



SEGMENT

MODERN DAY LIVING



THE IMPORTANCE OF DIGITAL BANKING FOR RETENTION & GROWTH

12,053

Consumers marked as "Attrition Rate Positive"

11,510

"Attrition Rate Positive" with no digital banking activity past 45 days

4,526

Consumer Checking Accounts that have not had used online bill pay last 90 days

4,473

Checking accounts with no recurring bills in the last 90 days

3,645

"Attrition Rate Positive" Indirect Loans

2,326

Checking accounts with no direct deposit last 31 days

Only 543

"Attrition Rate Positive" accounts registered with digital banking



We can help you identify insights to target your account holders.



Life Events



Activities & Interests



Financial Health



Competitive FI Products & Activity

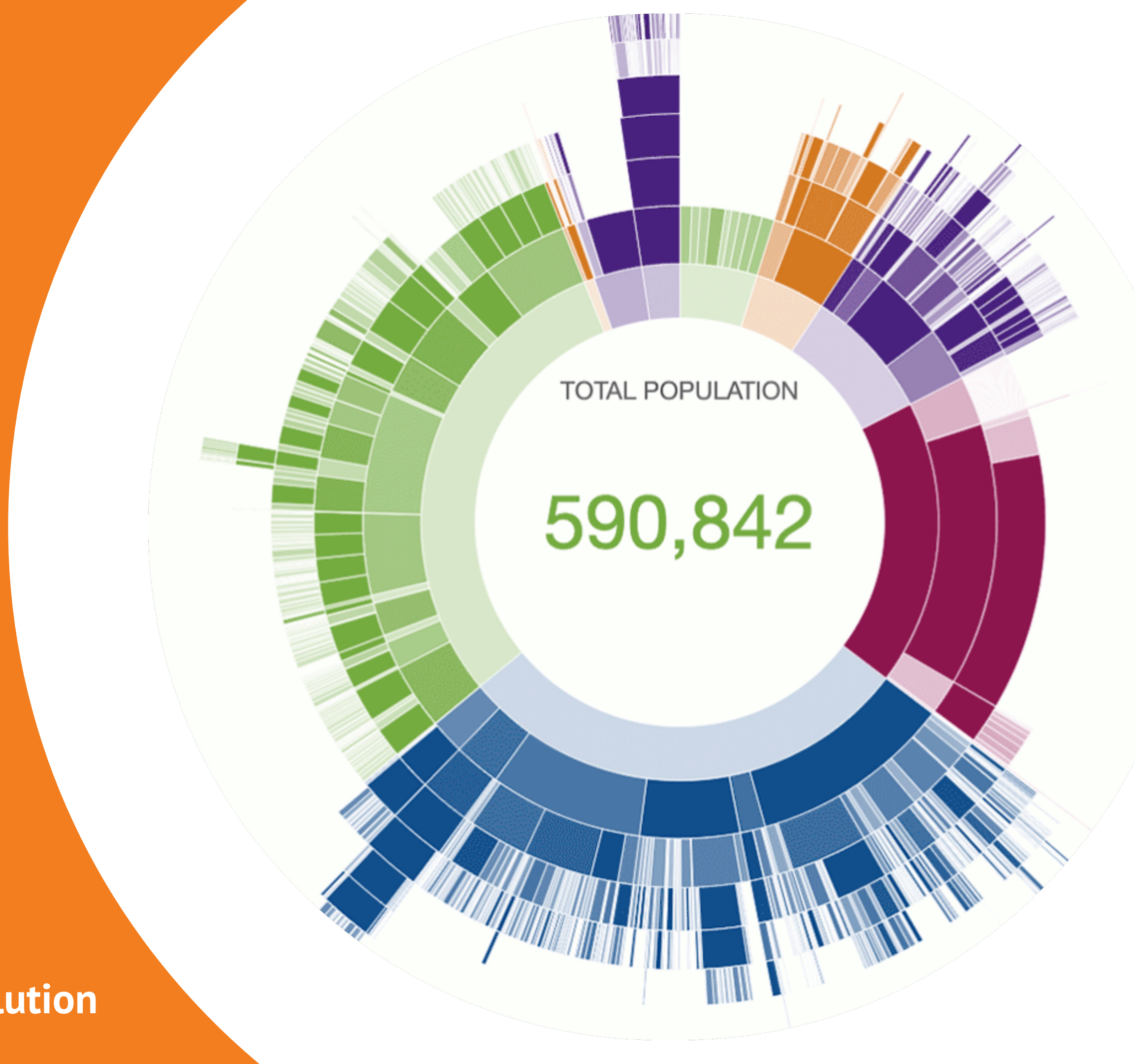


AI Cross-Sell Predictive Audiences



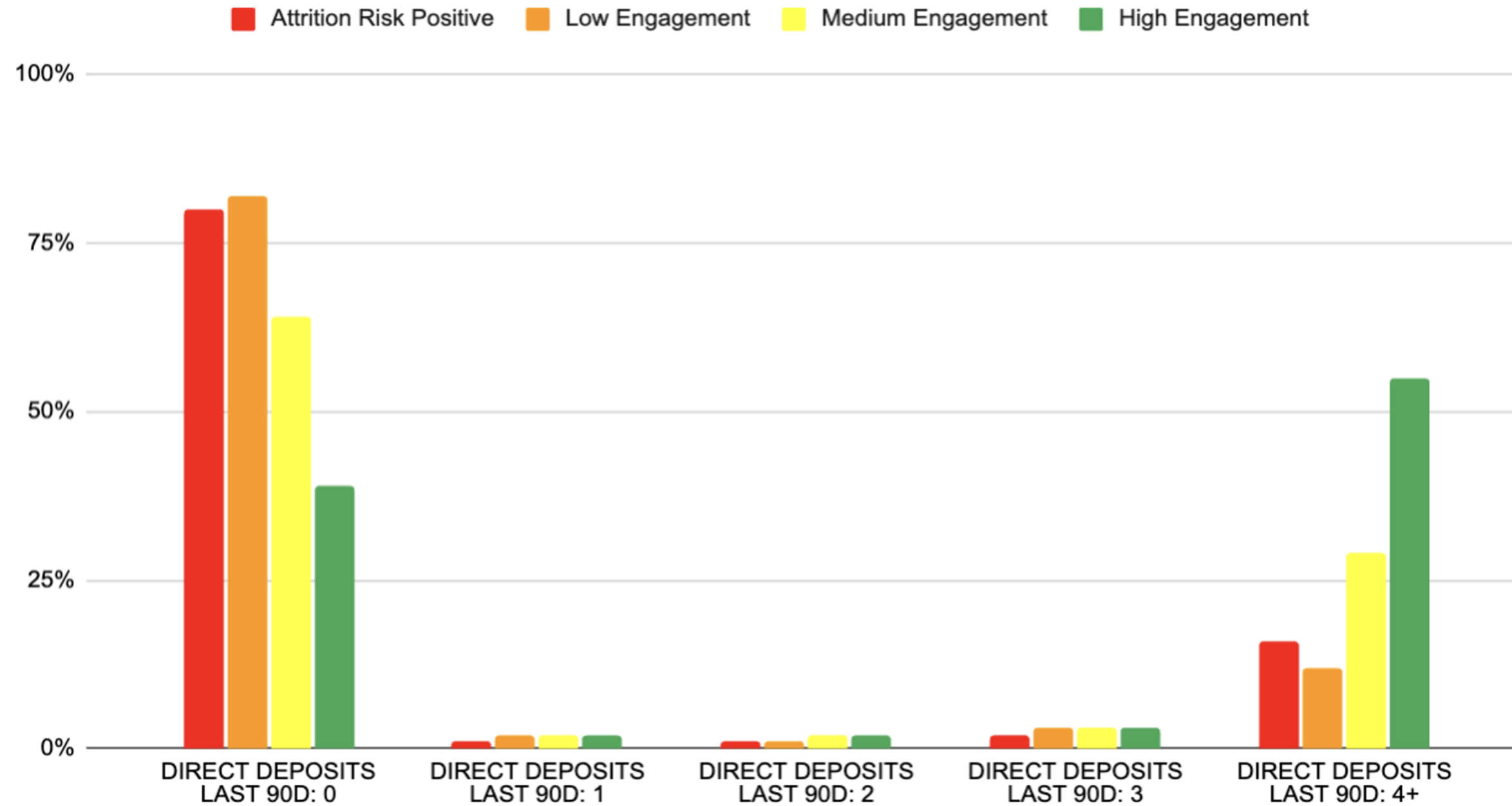
Product Utilization

...A data science team in a software solution

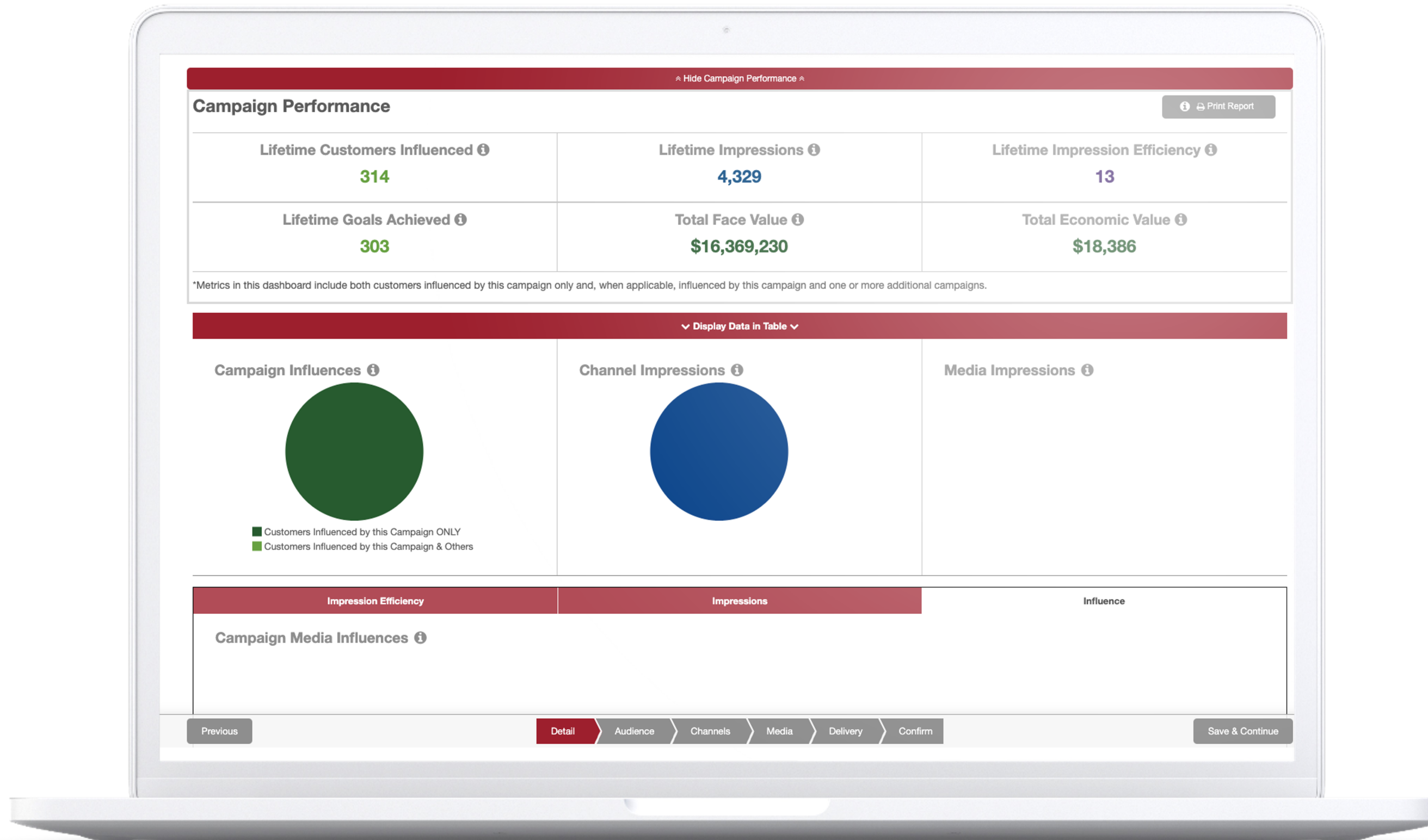


IDENTIFYING ENGAGEMENT ATTRIBUTES

DIRECT DEPOSITS BY ENGAGEMENT LEVEL



3,239 NEW CDs + \$113M DEPOSITS



4X SURGE IN HELOC CROSS SELL CAMPAIGN RESULTS WITH HUMAN-AI SYNERGY

About the Institution

\$2B CU, located in Green Bay, WI

Campaign Duration

120 Days

The AI-driven safety net for cross-sell models identified 52 prospects totaling \$2.6 million, demonstrating a performance that is 4X superior to the human-curated list.



AI-generated KLI Selection:

AI Cross-sell Home Equity

+



7,898

Impressions

52

Lifetime Goals

\$2.6M

Conversions - Face Value

\$51,112

Average Face Value

Human only-generated KLI Selection:

Competitive Student Loan + Consumer Mortgage, Competitive Mortgage, Mobile Home & Mortgage Refinance



1,458

Impressions

13

Lifetime Goals

\$555K

Conversions - Face Value

\$42,967

Average Face Value



CSI CRM

CRM

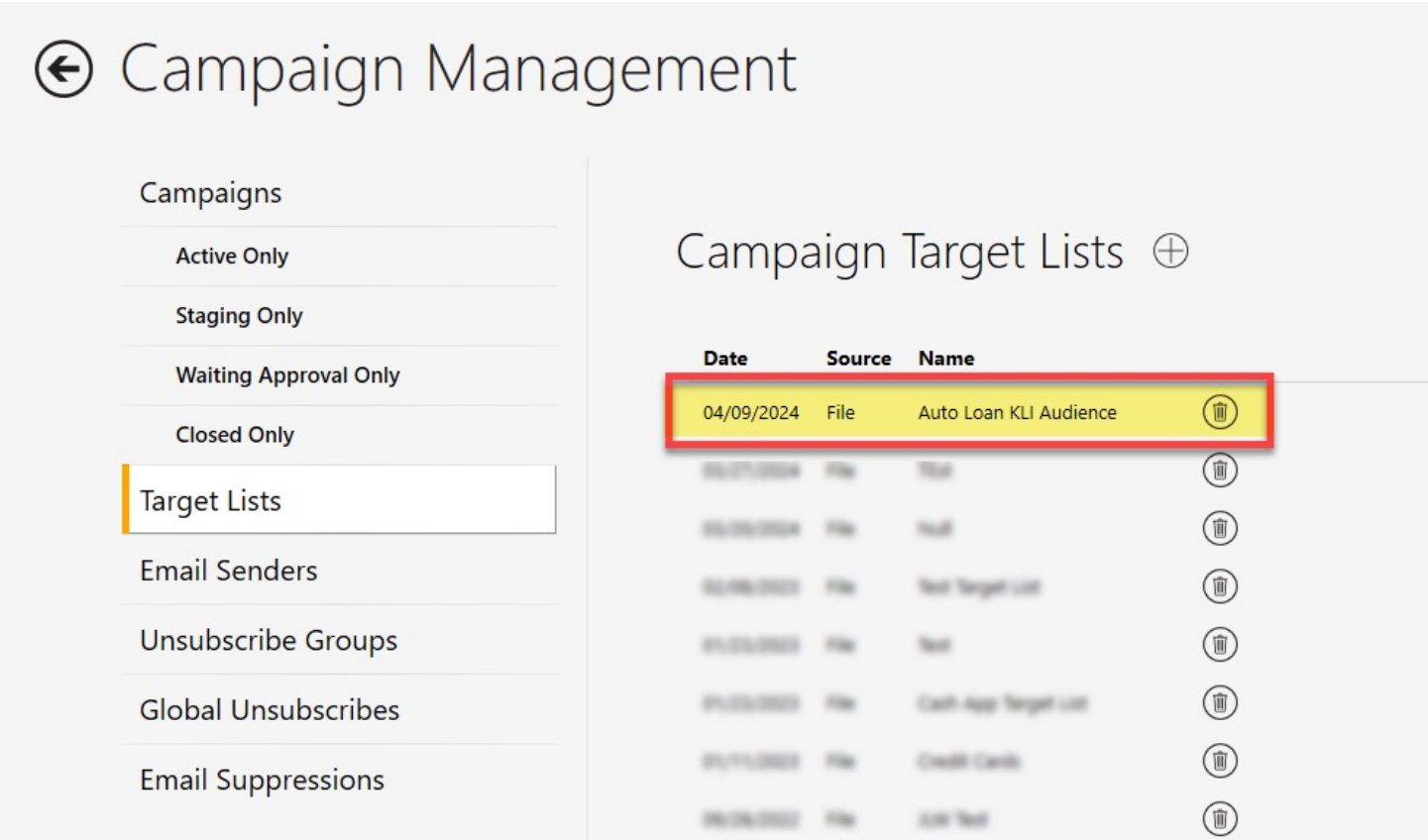
- Access to KLIs[®] is readily available within the Customer View screen through a dedicated tile.
- You can see all scrubbed transactional data returned from Segmint laid flat within the tile.
- This data is also reportable within CSI's Ad Hoc reporting tool, IQ, and can be found in the Complete Universe.

The image displays a CRM interface with a grid of tiles. A red box highlights the 'Key Lifestyle Indicators' tile, with a red arrow pointing to it. To the right, a larger tile shows the 'Key Lifestyle Indicators' logo. Below the grid, a section titled 'Key Lifestyle Indicators' lists several categories: Competitive FI Products & Activity, Client Segmentation, Consumer Spend, and Customer Behavior Indicators.

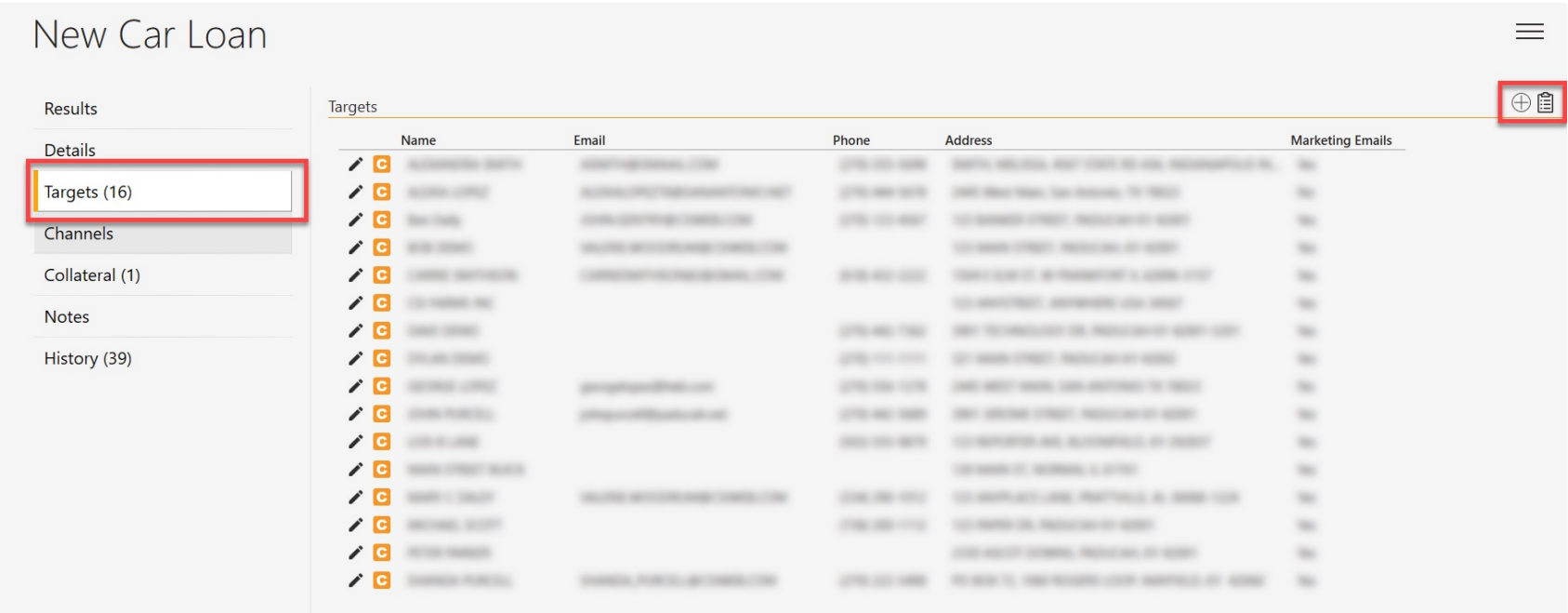
The data view shows a tree structure for 'CSI_Complete [unx]'. The 'Key Life Indicator' folder is highlighted in yellow, with a red arrow pointing to it. The tree structure includes:

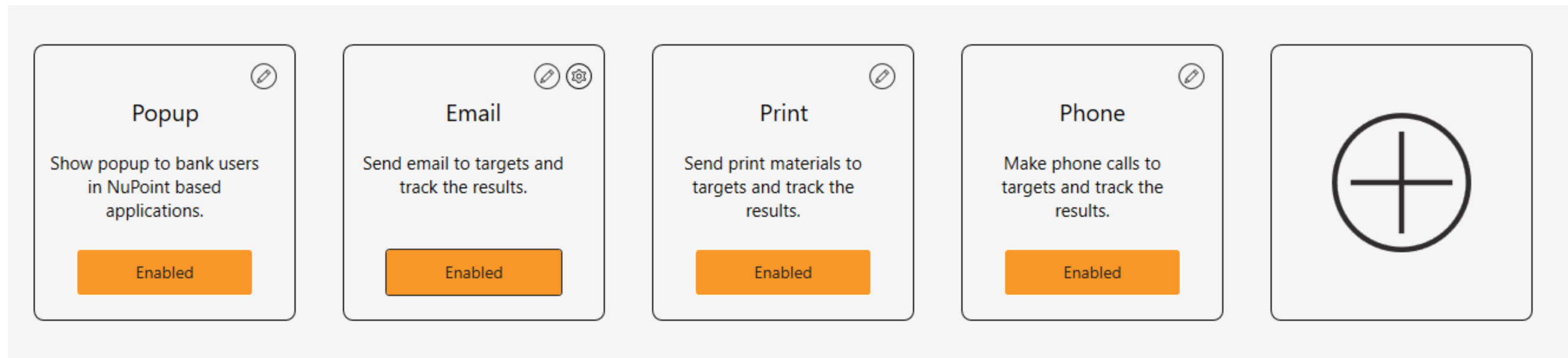
- CSI_Complete [unx]
 - Customer Information
 - Customer Profile
 - Demographics
 - Bank Info
 - Tax Info
 - ID Theft
 - Auxiliary
 - CIF Activity
 - Remarks
 - VRT
 - Custom Fields
 - CIP Fields
 - Account Totals
 - Additional Fields
 - NET CIF
 - Key Life Indicator

CRM – CAMPAIGN MANAGEMENT MODULE



- With CSI’s CRM – Campaign Management module you can easily unmask the UCIC’s from the audience you create and export on the Segment Platform.

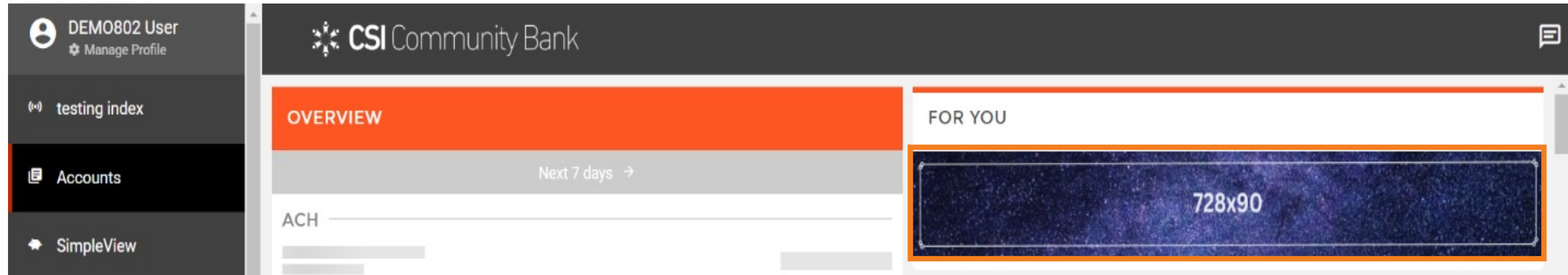




- You can use the exported list to create phone campaigns, send out email blasts to those customers, or have pop ups appear on the customer screen as well as in teller.

CSI DIGITAL BANKING

DIGITAL MARKETING IN DIGITAL BANKING



- Digital Ad utilizes Segmint to generate the ad
- Ad space is on the main account page
- Can have multiple ads to reach different audiences

ARRAY OFFERS ENGINE

- Array is our credit score partner
- There is an ad space within the Array credit score interface
- Credit score-based targeted ad
- Takes customer to your experience to apply



INVISIONBANK

MY CREDIT

Thomas E Friedman
Your credit is in good shape

Provided by experian
Report: Jul 14, 2020

670
Your Credit Rating
GOOD
Vantage Score 3.0

634
GOOD
Mar 20, 2020

Apr 15 Jun 29 Sep 12 Nov 26 Feb 9 Apr 25 Jul 9 Sep 2

Car Loans by Invision Bank
\$25,000 approved exclusively for you
Buy a car with \$25,000 in financing at 3.00% APR for 60 months. No application required.

APPLY NOW
and see more details, rates, and fees

Sponsored

Credit Report
Review your accounts

Score Factors
Understand your score

Credit Alerts
3 alerts found

Debt Analysis
Get a deeper view

Score Simulator
Unlock your potential

TAKEAWAYS

- Demo Hub & eLearning
 - [Fintexperts Demo Hub | CSI \(csiweb.com\)](https://csiweb.com)
 - [Learning Hub](#)
- Talk to your RM or BDD for more information about these products or to get started.

Q&A

THANK YOU!

