

INDUSTRY CASE STUDY

Growing Accountholder Relationships

Fisionary+™ deepens relationships by engaging and onboarding accountholders. This always-on strategy interacts with accountholders in your portfolio, with cross-serve messaging targeted 6+ times a year.

A 16-office bank implemented Fisionary+™ to improve their onboarding of new customers and to offer existing customers products and services they have not previously used. Households received a series of emails based on their relationship and journey with the bank which aligned with the bank's strategic priorities.

The bank has enjoyed significant new adoption of the products and services presented. Over six months, the households that were emailed opened:

- **21 new retail checking accounts with an aggregate annual value of \$7,308 and a lifetime value of \$48,027**
- **66 money market and savings accounts, 11 certificates of deposit, and seven mortgages create additional low-cost deposits and interest income**
- **55 new online banking users and 29 eStatement recipients represent significant cost savings for the institution and increased service adoption**

By implementing a proactive and data-driven strategy, your institution can also develop and maintain stronger and more profitable customer relationships. Both Fisionary™ and Fisionary+™ can be tailored to suit your institution's goals. Haberdeld does all the work, freeing up your teams to focus on other high-payoff activities.

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NEW ENROLLMENTS FROM FISIONARY+™

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|-------------------------------------|--------------------------|
| 21 Checking Accounts | 7 Mortgages |
| 15 Benefits Checking | 55 Online Banking |
| 77 Money Market, CD, Savings | 29 eStatements |

NEW CHECKING RELATIONSHIPS

