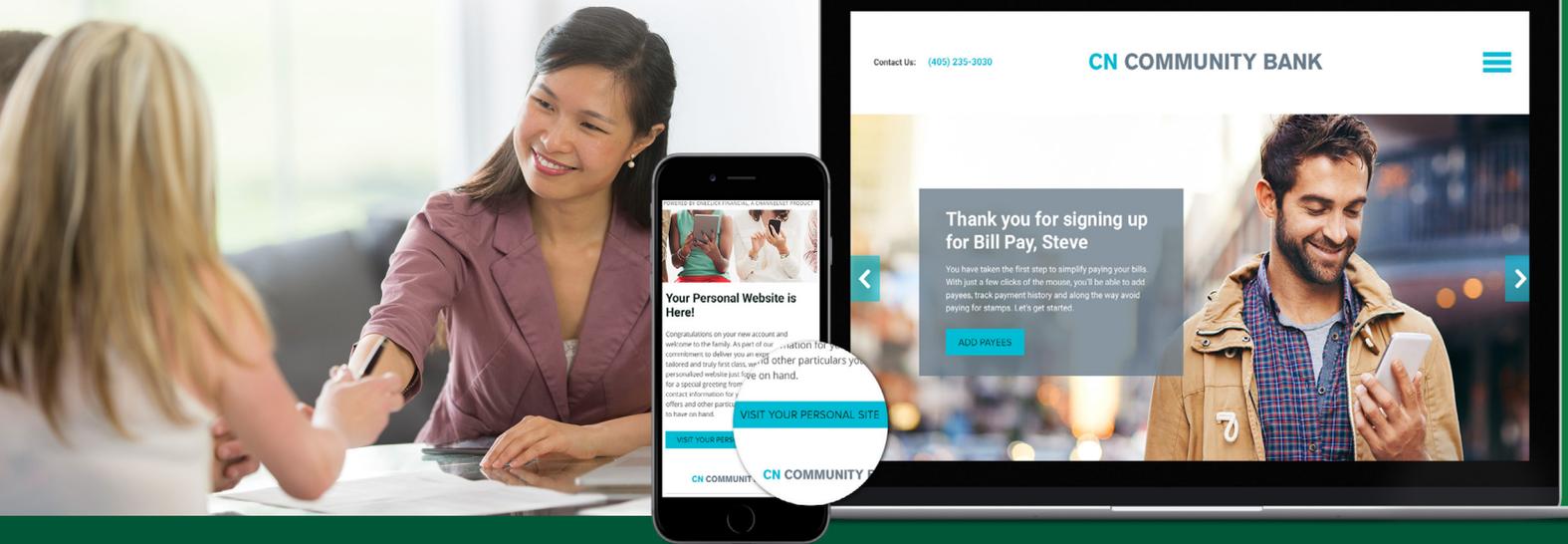




# ONECLICK FINANCIAL™



## Welcome. Cross-Sell. Grow Share of Wallet.

### Meet OneClick Financial™

What if you could leverage personalization and content automation technology to enhance your customer experience, expand deposit relationships, and drive additional revenue? Meet OneClick Financial™ — a product specifically designed for today's financial institutions. OneClick Financial is a comprehensive digital welcome and cross-selling platform designed to deliver a targeted, automated, digital experience to help financial institutions enhance customer engagement and increase revenue from both new and existing customers.

**You sign up. We do the rest.**

**Don Mallory**  
**V.P. Sales**

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**OneClickFinancial.net**

### We Start at the Beginning

Our platform activates right at the point of enrollment. Whether your customer has joined in-branch, online or via indirect lending, we immediately introduce them to all the relevant products and services you offer. It is during this onboarding period that new customers are most receptive to cross-sell opportunities, and where your bank or credit union can establish the foundations of a long-term, mutually beneficial relationship.

### We Offer a Cross-Sell Solution

Traditional branch interactions and conventional marketing strategies are no longer effective in today's digitally driven world. Our platform analyzes a customer's real-time needs, interests and behaviors to deliver the right mix of information, products and services that expand your customer relationship and increase overall adoption.

*Studies have shown that digital engagement has the capability of boosting profit by 15 to 20 percent.\**

### We Do it With Personalization

A powerful personalization engine distributes the right message to the right customer at the right time, supported by real-time analytics.

### We Do it With Turn-Key Support

While our platform is designed for plug-and-play, we haven't forgotten the importance of support. Once enrolled, our Digital Content Support Desk has your back via dedicated phone number and email. We even help you track and improve upon your success via monthly analytics reporting.

*\*McKinsey&Company*

# Welcome. Cross-Sell. Grow Share of Wallet.

OneClick Financial connects the dots so you don't have to. It all starts with a proactive welcome email that drives each customer to their own Personal Website while continuing to digitalize online communication and increase cross-promotion opportunities.

## Point of Enrollment

Whether an account is opened in-branch, online or via indirect lending, a welcome email and thank you touchpoint is generated and automatically sent within 24 hours of sign-up. The customer is introduced to their Personal Website immediately after enrollment ensuring the greatest impact and customer adoption by establishing a comprehensive digital communication channel.

## Introduction to Personal Website

Customers are introduced to their Personal Website via their welcome email. Each Personal Website consists of data-driven, variable components such as information about the institution, relevant cross-sell products/services and more. The content of each Personal Website is triggered dynamically based on customer data and business criteria in order to maximize the revenue growth opportunity.

## Fostering Growth & Expanding Product Adoption

The customer's Personal Website stays with them throughout their relationship with the institution, driving revenue for the bank or credit union. As the needs of the customer change, the Personal Website evolves with them to ensure continuous engagement and relevant messaging.

Proprietary business rules kick the platform into high gear to encourage cross-sell and deposit relationship growth cementing the customer's relationship for a longer period of time. Studies indicate a customer with three products will remain at an institution for an average of 6.8 years compared to 18 months with just one product.

Visit us:

[OneClickFinancial.net](https://www.oneclickfinancial.net)

Customizable Header

Customizable Personal Messages

Customizable Hero Image

Customer Satisfaction Survey

Products & Services

Social Share

Go Paperless

Targeted Video

Lifestyle Survey

Referral Lead

Social Review

Contact Us

Footer with Social Share