DeepTarget & Alogent

April 2021 Update

Dr. Ignacio Guerrero, CTO & EVP

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Our Agenda for Today

An Overview of DeepTarget
Reminder & Recap

DeepTarget In 2021
What's New

Why DeepTarget - Key Differentiators
Why Our Customers Chose Us

Deployment
Information & Insights

General Q & A
What can I address for you today?

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An Overview

And Recap

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In Use Today By

200 FINANCIAL INSTITUTIONS

GENERATING

More than **325 Million** ENGAGEMENTS

More than **90,000** QUALIFIED LEADS

More than **8,750** ACCOUNTS OPENED

EVERY MONTH*

*as of March 2021

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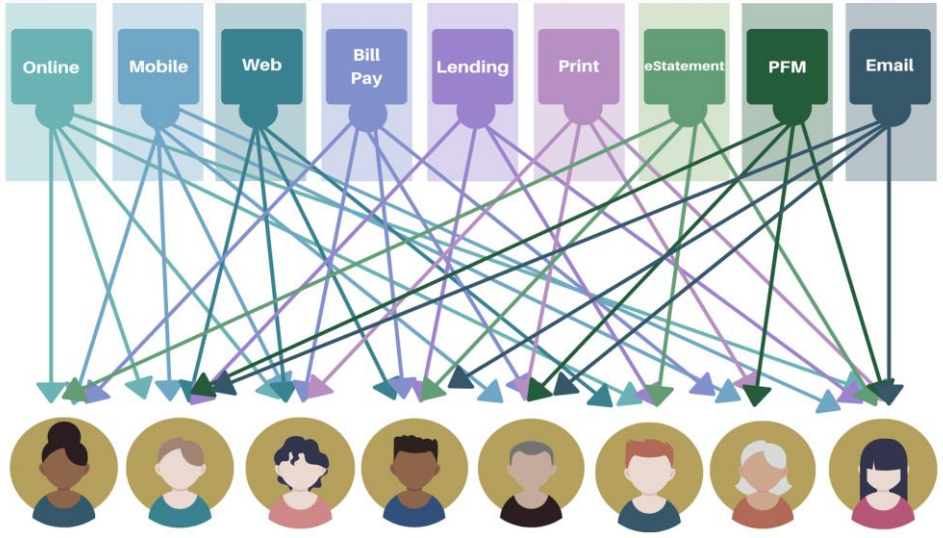
DESIGN ONCE. ENGAGE EVERYWHERE.™

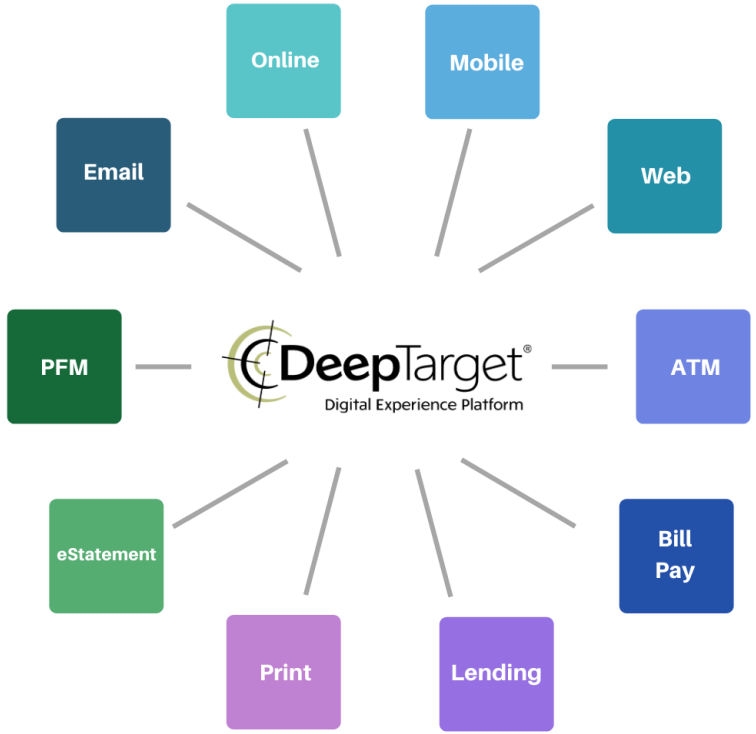


FI Landscape - Communication and Campaign Silos

DeepTarget automates and elevates customer experiences digitally to yield new loans, deposits & customer loyalty for credit unions and banks.

FROM THIS...

...TO THIS



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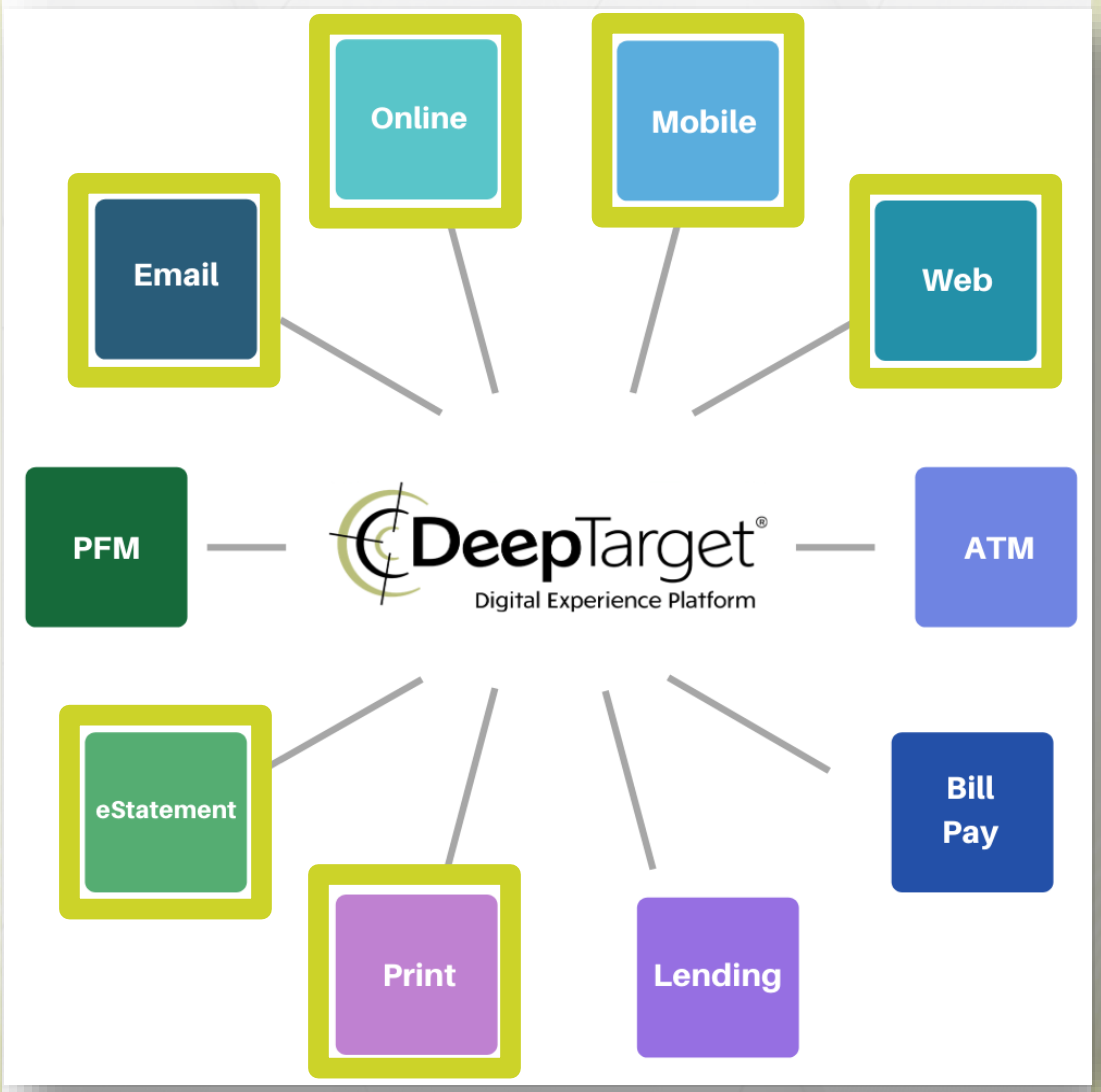
Digital Experience Platform (DXP)

Big Data Management

Intelligent Targeting

Campaign Operations



Message Delivery

Performance Analytics

Channel currently activated

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Digital Experience Platform (DXP)

Big Data Management	✓ **From simple to sophisticated**: auto-upload or dynamic multi-sourced feed for right-fit rapid Implementation ✓ **Secure, compliant** handling of NPI data ✓ **Full cycle engagement-to-results** data capture to power ML algorithms and 3rd party data aggregation
Campaign Operations	✓ **Manage entire campaign lifecycle**: create, publish, edit, delete/archive, and schedule concurrent campaigns ✓ **Real-time Personalization** authoring tool for dynamic name + consumer data placement ✓ **Auto-response** email on clicks ✓ **One-click extension** of campaigns to 3D StoryTeller ✓ **Rich copyright-free** content library
Intelligent Targeting	✓ **Innovative AI-based** predictive targeting based on proprietary consumer data ✓ **Rules-based** and traditional list-based targeting ✓ **Automated import** of data for targeting (Experian, Segmint, CRM, MCIF, etc.) ✓ **Automated de-targeting** based on engagement
Message Delivery	✓ **Always-on smart** traditional banners, multimedia banners, and Interstitials ✓ **Immersive, dynamic, personalized "Smart Stories"** ✓ **Social-inspired** swipe tech plus user-triggered response action, engagement metrics ✓ **ADA-compliant** ✓ **Omni-channel campaigns** by designing once and engaging everywhere that consumers bank
Performance Analytics	✓ **Macro to micro analytics** and engagement metrics: manage and view ✓ **Influenced sales conversions** by campaign: identify all metrics ✓ **Powerful Analytics API** to share results with BI apps such as Tableau, Power BI, etc.

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Robust Technology Platform

Data Communications System

Automated Backend Process

Content Management System and Performance Analytics

Web Application

Intelligence Driven Targeting

Processing Engine

Multi-Channel Digital Engagement

Web Services

API

REST based

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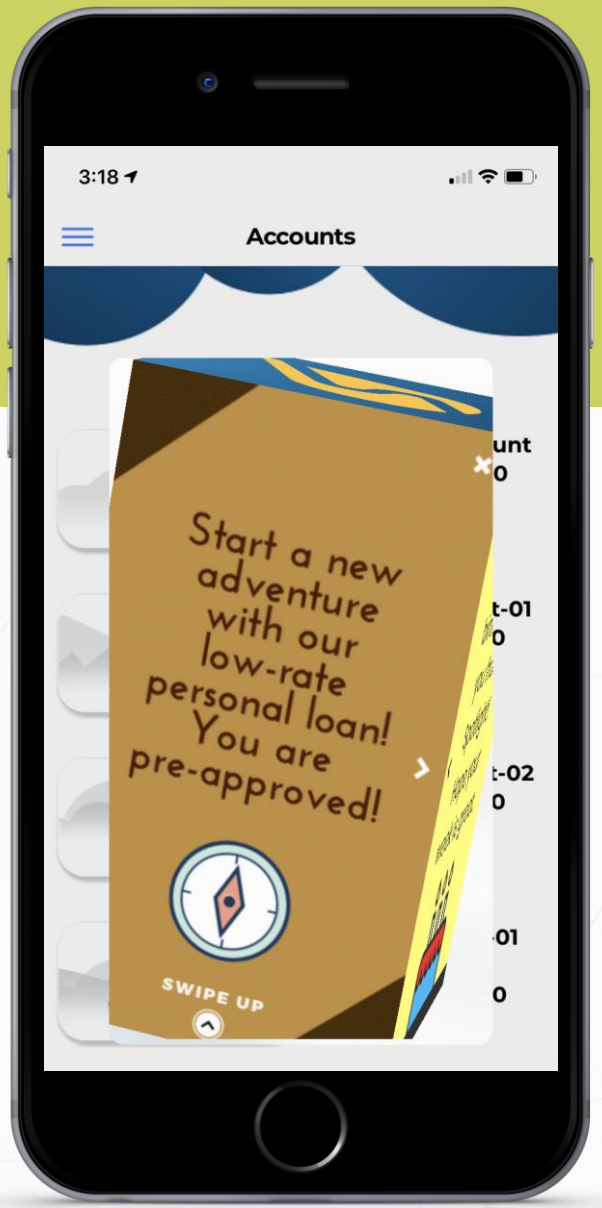
Automated Targeting

Sophisticated solution to mix and match customer/business intelligence and different targeting methods for each campaign



Rules-based

Rules evaluate customer & business data to present relevant ad

AI-based using Predictive Campaigns

- Proprietary database
- Rolling 6 months of data across more than 200 FIs
- FI data evaluated against algorithm, targets correct offer

Audience Lists from external systems

Salesforce, other CRMs
Segmint, Experian

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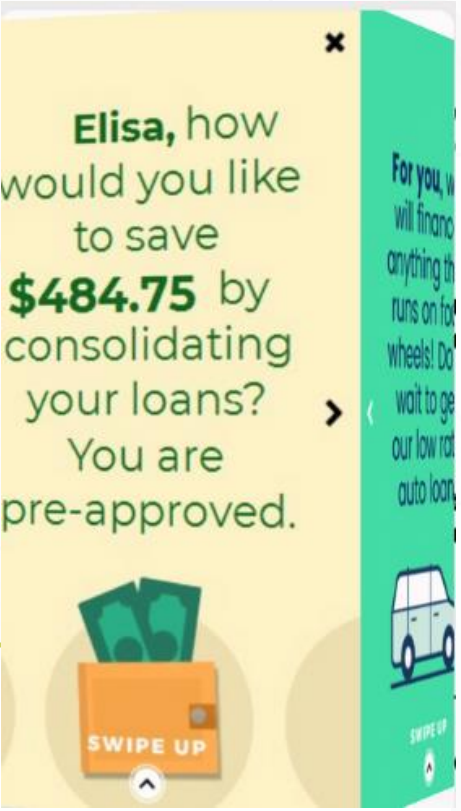
Sample Ads



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DeepTarget In 2021

Recent Introductions and What's New

3D StoryTeller – a review

AI-based Predictive Targeting – a review

Management Reports – a review

Analytics API: A booster shot for Performance Analytics – New in 2021

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3D StoryTeller™

Pioneering, Patent-pending Tech creates Unique and Personalized user experiences – in real time and at scale. FIs report dramatically higher engagement!

- **Social-inspired** engagement experience – but *smart*
- **1200+% Increased Engagement** received with 3D StoryTeller + Predictive Campaigns*
- **Dynamic**, never static – the story changes based on *current* user profile
- **Discoverable**, conversational and triggered by actions
- ***My Financial Story*** - One home for all my unique offers
- **Beyond Offers** - Onboarding, Virtual Financial Escort, Outreach

Swipe actions get captures; Stories get smarter.

Smart Stories remove friction, save time, give benefit.

Personalized Offers | Onboarding | Financial Literacy | Community Outreach

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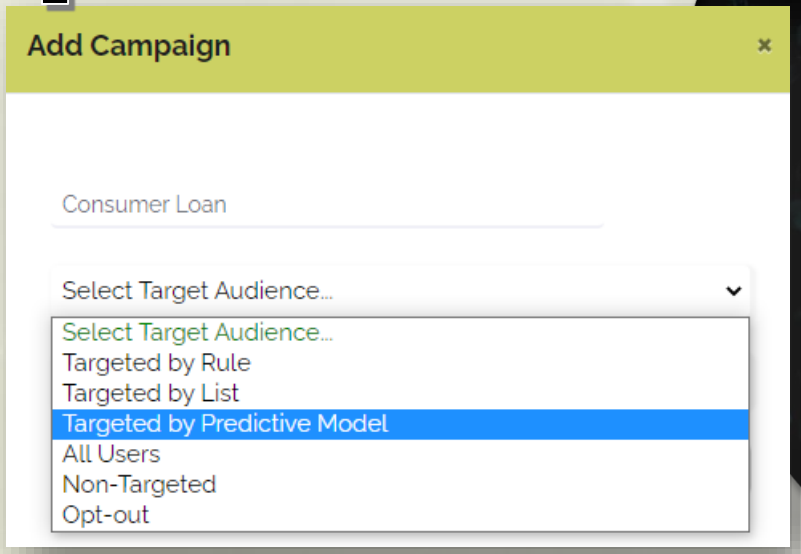
3D StoryTeller Video | Finovate Demo

* Ohio Valley Bank

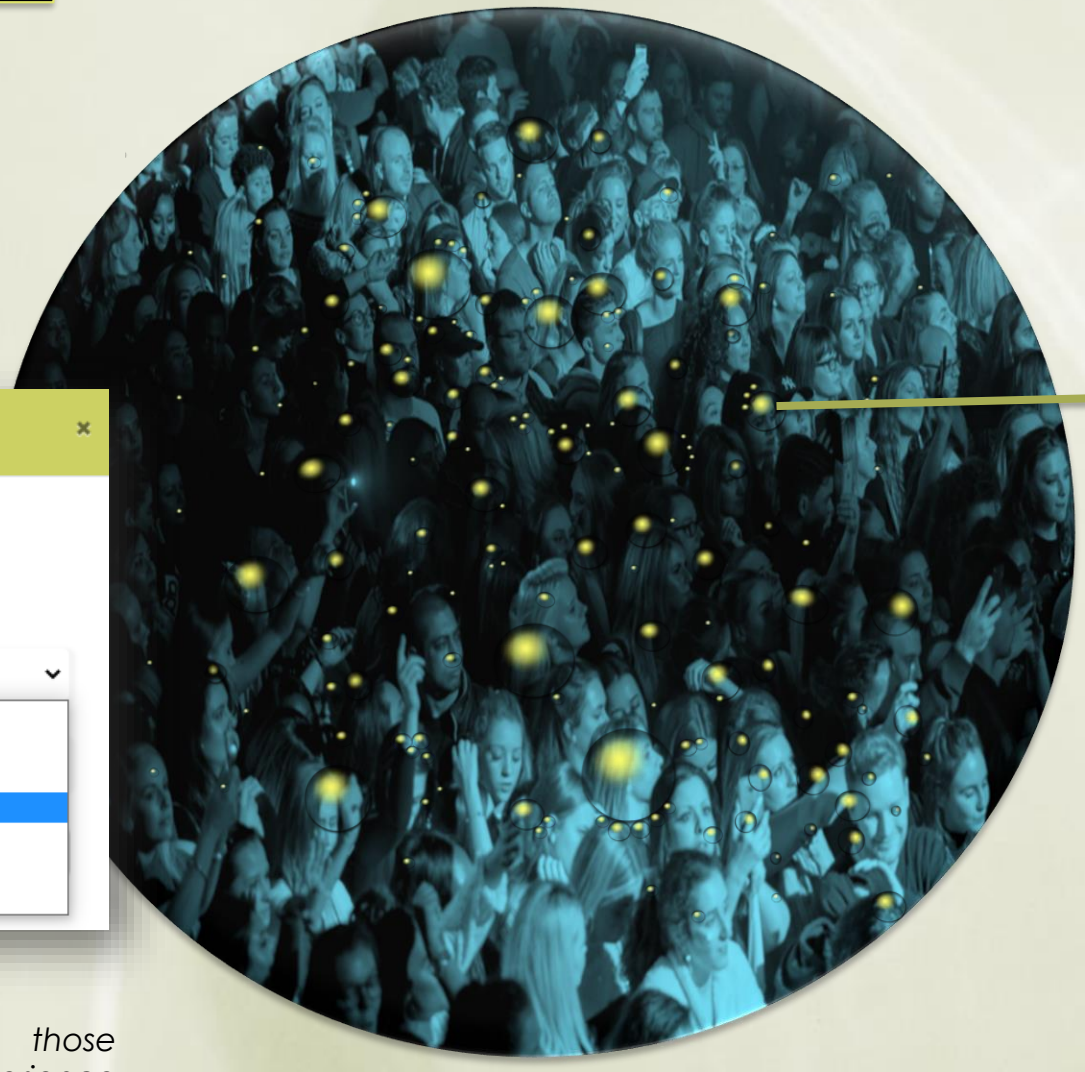
AI-Based Predictive Campaigns

1 The financial institution selects **Targeting by Predictive Model** for their Consumer Loan campaign.

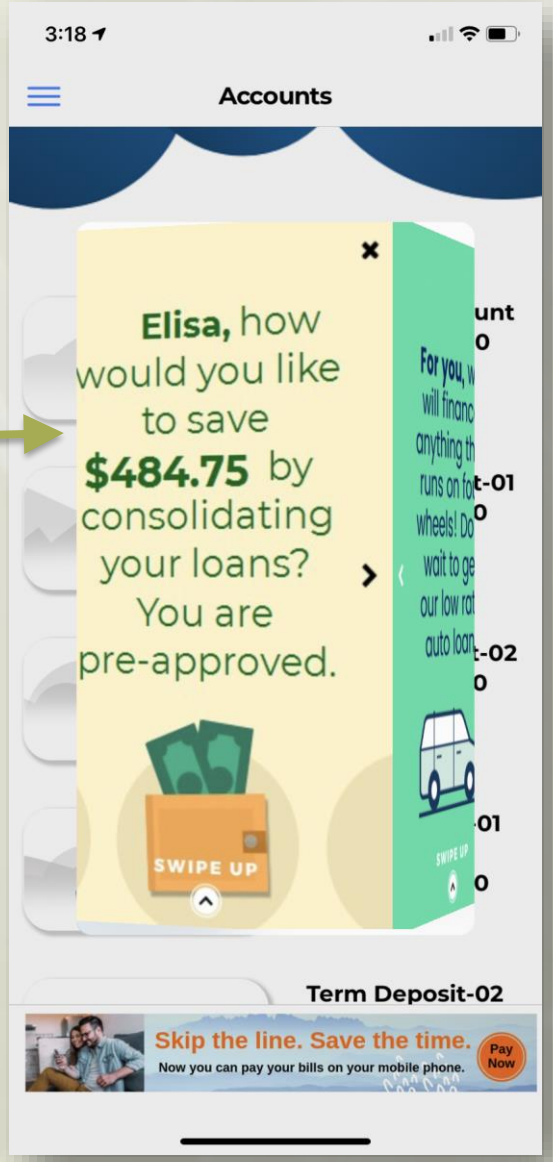


Given a campaign/product category, those identified by DeepTarget's Digital Experience Platform (DXP) are the ones most likely to open an account for that product.

2 Based on AI, DXP identifies the **Predictive Campaign Audience** from the universe of all banking account holders.



3 The ad is then presented to identified consumers when they use digital banking.



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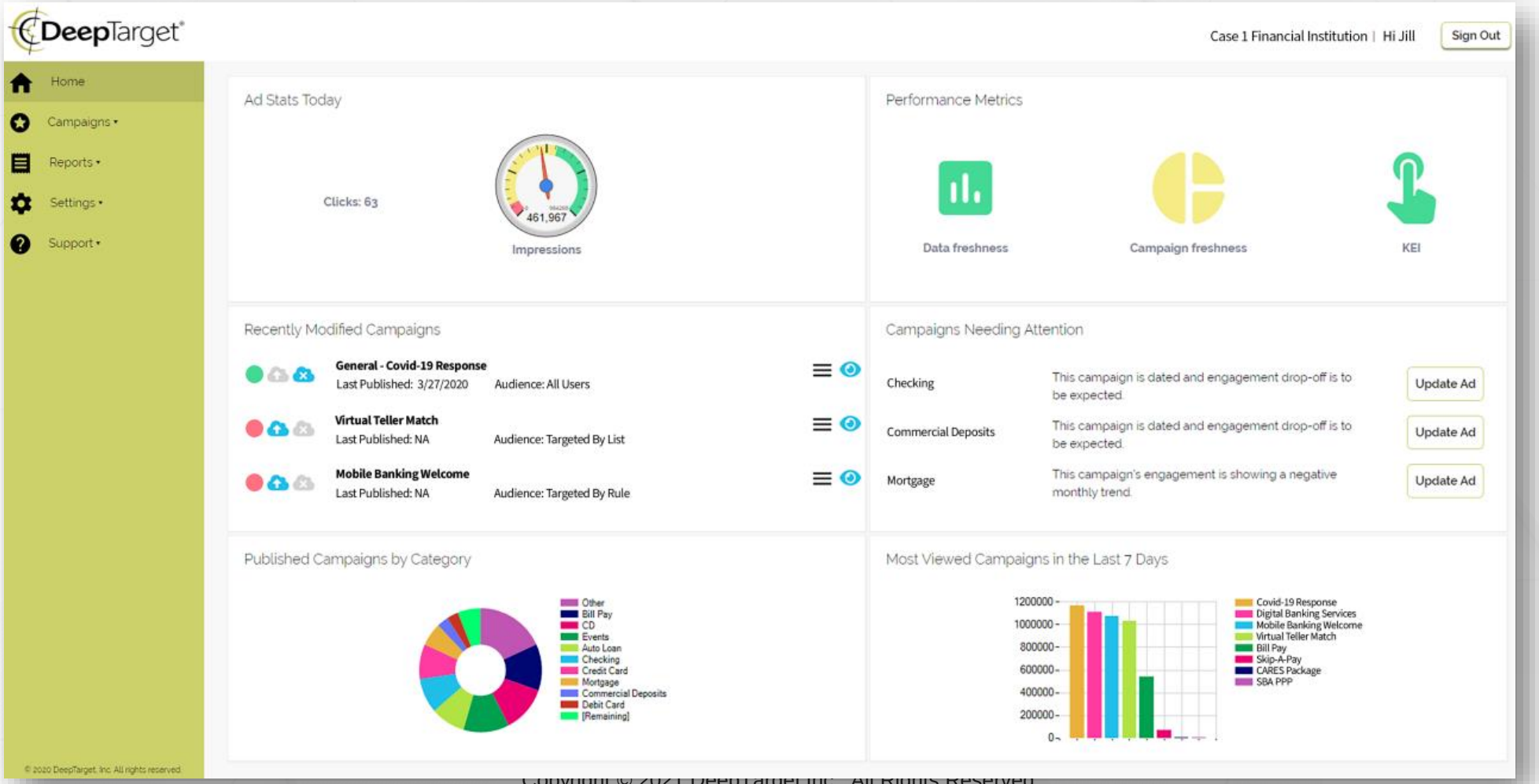
In-built Micro-to-Macro Performance Analytics

Always On, Always Tracking

Engagements | Qualified Leads | Accounts Opened



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Management Reports – A Review

The ability for FI decision makers to understand the impact of digital engagement.

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MANAGEMENT REPORT

DXP Management Report with a summary of outcomes

Month	Channel	Campaigns	Total Impressions	Unique Impressions	Unique Clicks	KEI™	KEI Rating	Leads	Inf. Conversions	KMI™	KMI Rating
Oct 20	OLB	36	1,680,243	7,877	134	59	EXCELLENT	1,296	243	94	OUTSTANDING
	Mobile	36	3,675,488	18,104	1,164	16	OUTSTANDING				
	eDocument	0	0	0	0	NA	NA				
	Combined	36	5,355,731	22,947	1,296	18	OUTSTANDING				
Nov 20	OLB	33	1,782,531	7,661	115	67	EXCELLENT	1,203	186	123	EXCELLENT
	Mobile	33	3,660,254	18,170	1,093	17	OUTSTANDING				
	eDocument	0	0	0	0	NA	NA				
	Combined	33	5,442,785	22,892	1,203	19	OUTSTANDING				
Dec 20	OLB	27	1,985,333	8,374	156	54	EXCELLENT	1,377	171	141	EXCELLENT
	Mobile	27	4,421,407	19,026	1,222	16	OUTSTANDING				
	eDocument	0	0	0	0	NA	NA				
	Combined	27	6,406,740	24,059	1,377	17	OUTSTANDING				
Jan 21	OLB	26	3,044,292	8,955	165	54	EXCELLENT	1,675	142	175	EXCELLENT
	Mobile	26	4,612,732	19,517	1,513	13	OUTSTANDING				
	eDocument	0	0	0	0	NA	NA				
	Combined	26	7,657,024	24,792	1,675	15	OUTSTANDING				
Feb 21	OLB	27	1,815,796	8,893	107	83	EXCELLENT	1,764	163	150	EXCELLENT
	Mobile	27	4,218,880	19,277	1,657	12	OUTSTANDING				
	eDocument	0	0	0	0	NA	NA				
	Combined	27	6,034,676	24,480	1,764	14	OUTSTANDING				
Mar 21	OLB	27	2,132,854	8,987	150	60	EXCELLENT	2,221	270	130	EXCELLENT
	Mobile	27	5,535,818	20,880	2,070	10	OUTSTANDING				
	eDocument	0	0	0	0	NA	NA				
	Combined	27	7,668,672	35,030	2,221	16	OUTSTANDING				

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DXP Management Report with a results summary of influenced conversions

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INFLUENCED CONVERSIONS

Account Type	Oct 20	Nov 20	Dec 20	Jan 21	Feb 21	Mar 21	Total
CD	24	0	2	2	1	0	**29**
Checking	1	7	9	1	6	14	**38**
Commercial Loan	1	4	9	2	3	2	**21**
Consumer Loan	76	65	60	29	60	91	**381**
HELOC	0	1	0	0	0	0	**1**
Mortgage	9	8	6	4	1	4	**32**
New Auto	19	19	11	13	12	25	**99**
Used Auto	113	82	74	91	80	134	**574**
Total	**243**	**186**	**171**	**142**	**163**	**270**	**1175**

*Note: Deleting a campaign that has had an impression during the last 24 months may alter the Influenced Conversions count in this report. Please reach out to support@deeptarget.com in case of any questions.

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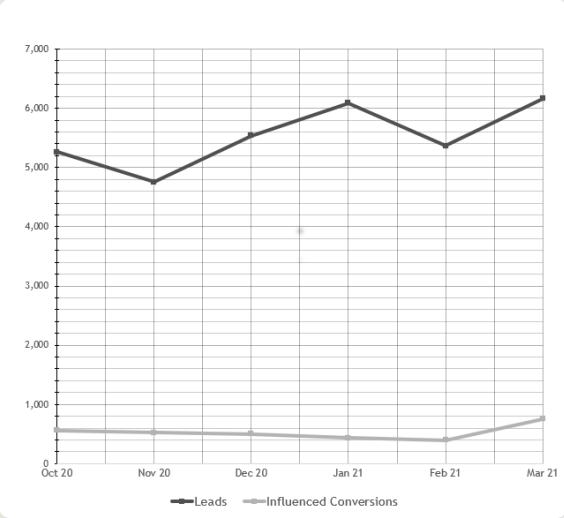
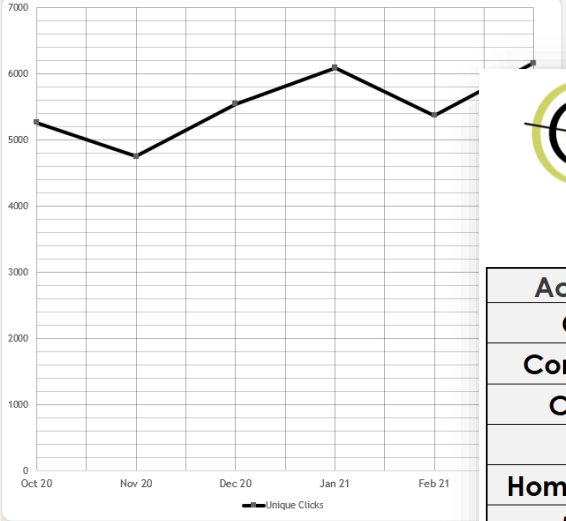
MONTHLY TRENDS

DXP Management Report with a results summary of monthly trends & influenced conversions

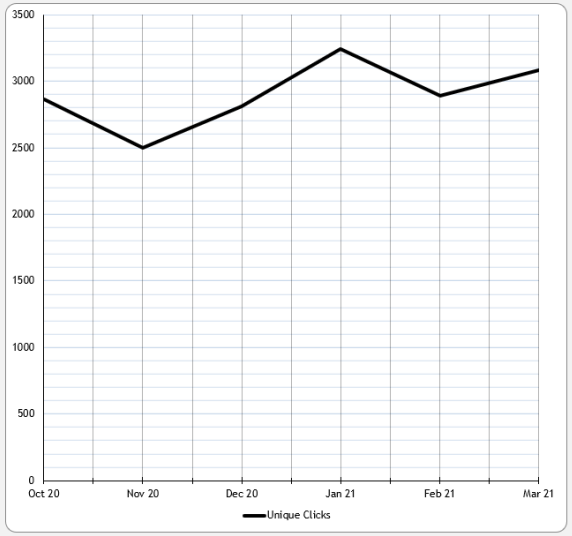
Leads & Inf. Conversion



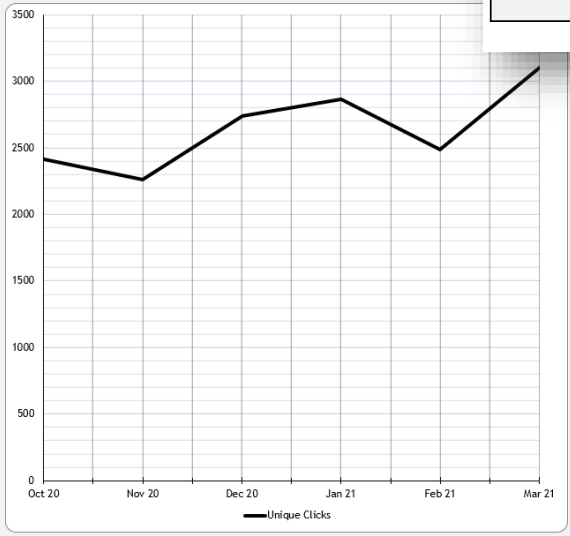
Combined Unique Clicks



OLB Unique Clicks



Mobile Unique Clicks



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INFLUENCED CONVERSIONS

Account Type	Oct 20	Nov 20	Dec 20	Jan 21	Feb 21	Mar 21	Total
Checking	83	92	104	70	61	65	**475**
Consumer Loan	174	134	127	121	104	209	**869**
Credit Card	23	30	20	16	3	0	**92**
HELOC	31	19	28	16	0	0	**94**
Home Equity Loan	14	16	18	7	1	0	**56**
Mortgage	94	117	84	88	115	123	**621**
New Auto	16	21	16	5	8	74	**140**
Used Auto	129	97	101	112	104	283	**826**
Total	**564**	**526**	**498**	**435**	**396**	**754**	**3173**

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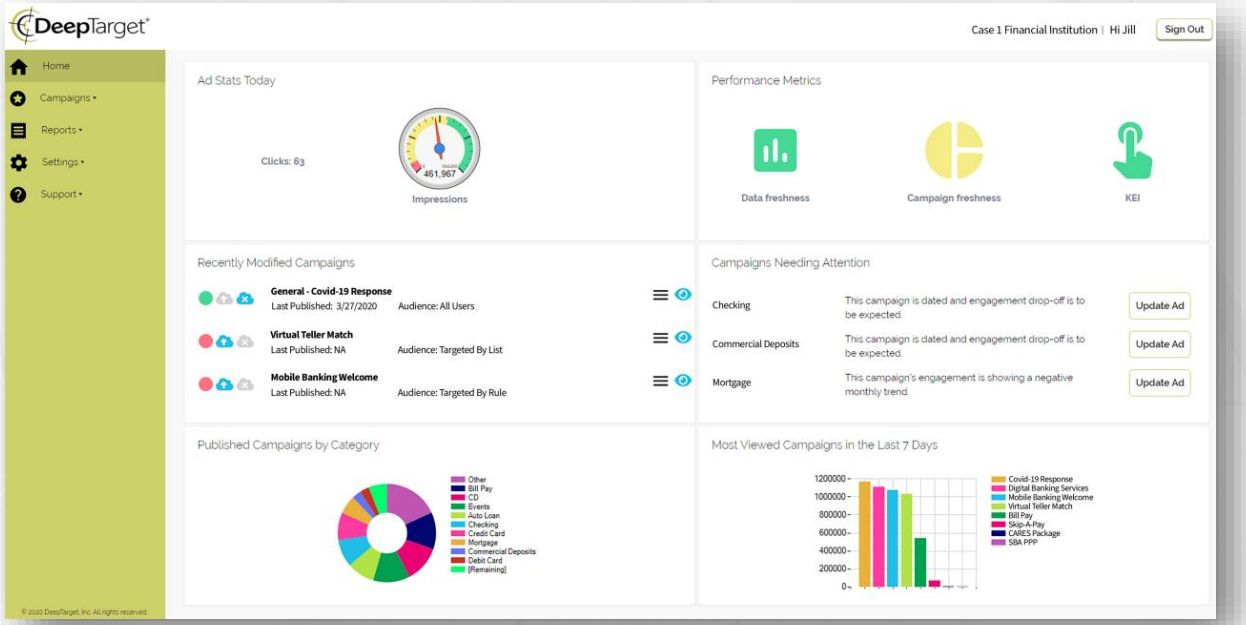
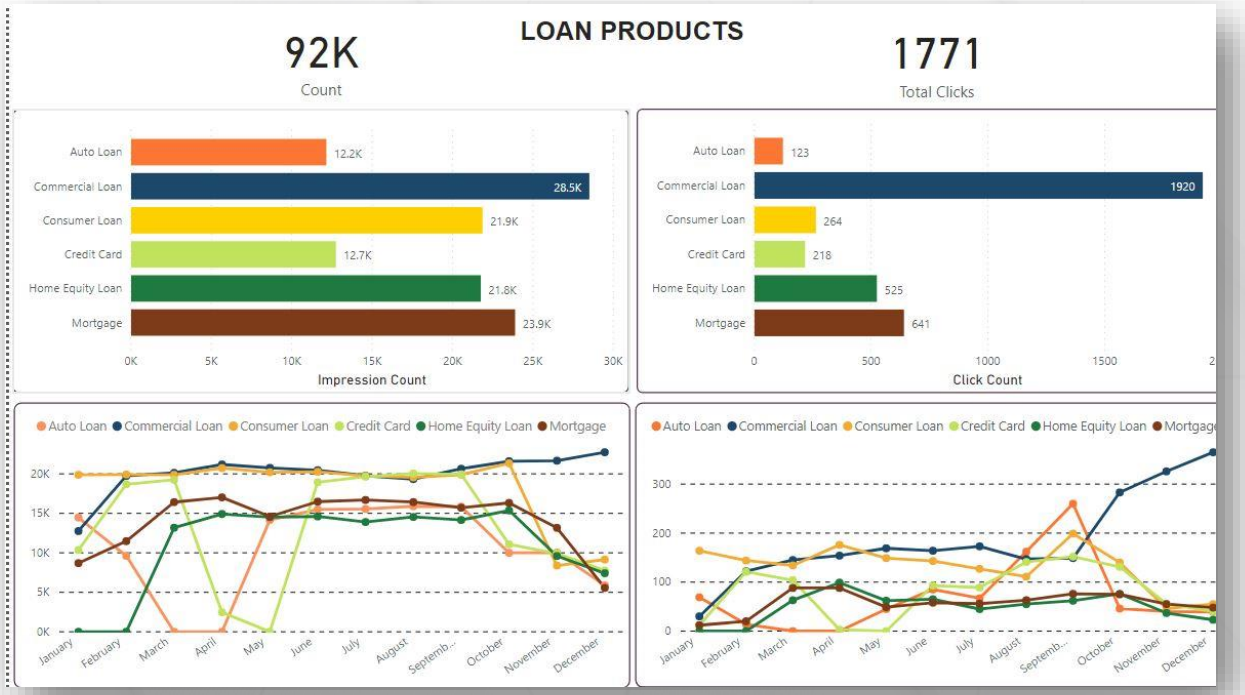
Managing for Results

Integrated Management Dashboard





Analytics API to feed Power BI, Tableau, etc.

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Extending In-Built Analytics

- The DeepTarget database stores user data, campaign information and performance analytics
- This includes 25 months of click and impression data – which number in the millions of records
- DXP has powerful performance analytics within the product that provides micro-to-macro reports and charts
- But sometimes you need more

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Introducing the DeepTarget Analytics API

The DeepTarget Analytics API is a REST API that application developers and data scientists can use to retrieve rich performance analytics data from DXP's big data store

There are 3 groups of APIs:

1. Campaign information
2. Statistics (aggregated click and impression data)
   - Counts over a time period
   - Time series based on a time interval, e.g., daily, weekly, monthly
3. User level-based Clicks and Impressions

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DeepTarget Analytics API

- Based on industry standard best practices for REST API
- Providing software developers with a well-documented specification to integrate DeepTarget's rich performance analytics data into their selected applications

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Benefits

- **Connectivity** to multiple enterprise systems to leverage rich performance analytics collected by DeepTarget
- **Automation** of workflows in the enterprise
- **Multiple Uses**: customer services portal, BI dashboard, Machine Learning interfaces, CRM connection and more

DeepTarget Analytics API – An Open BI Connector to a World of Automation and Apps

Business Analytics Services
- Power BI
- DOMO
- Tableau
- Oracle BI
- SAP Business Objects
- …

CRM
- Salesforce
- Oracle
- Microsoft Dynamics CRM
- Zoho CRM
- …

Marketing Automation

Customer Services Portals

Machine Learning Interfaces

And more…

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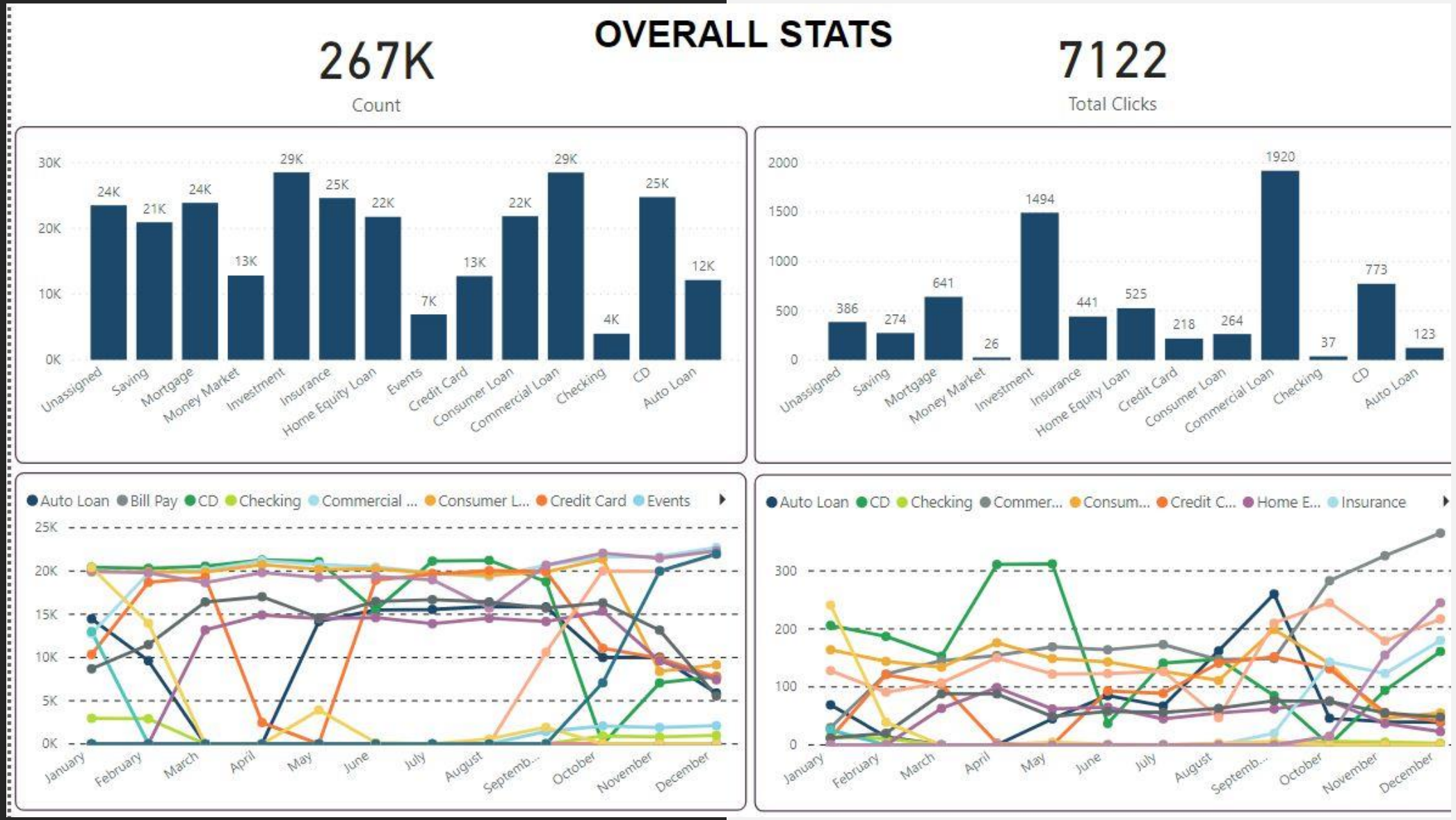
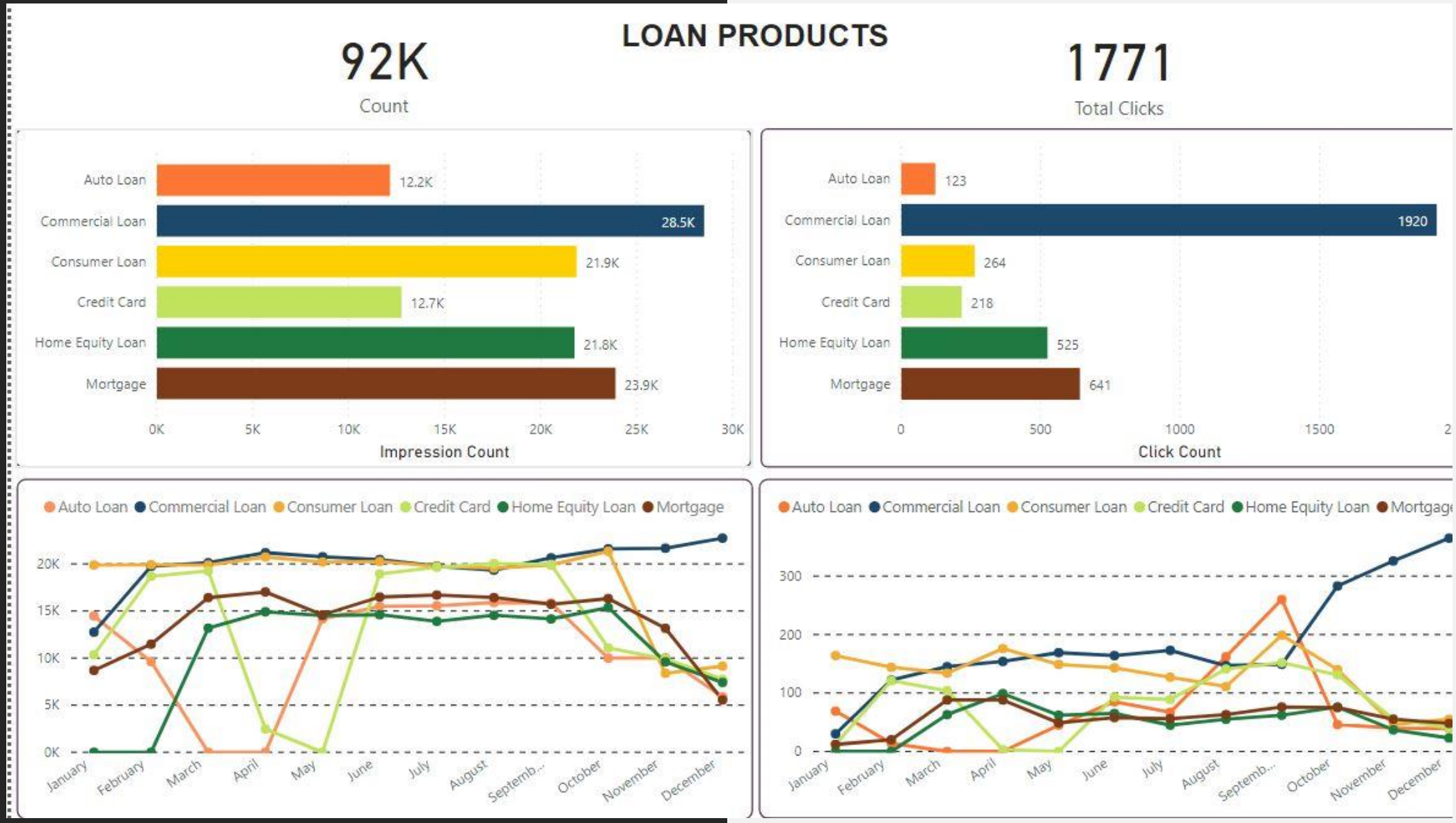
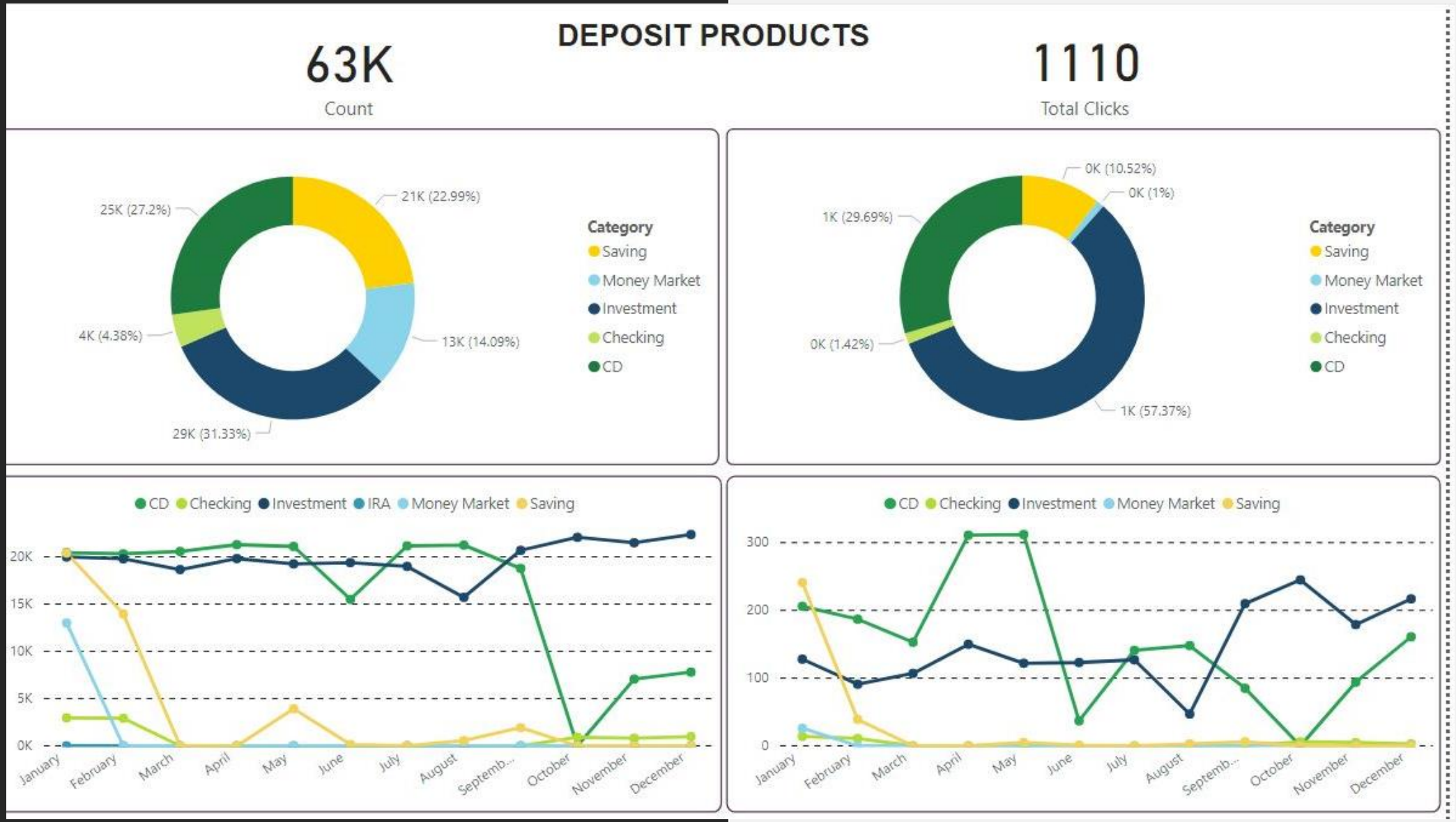


DeepTarget Analytics API to Power BI



DeepTarget Analytics API to Power BI



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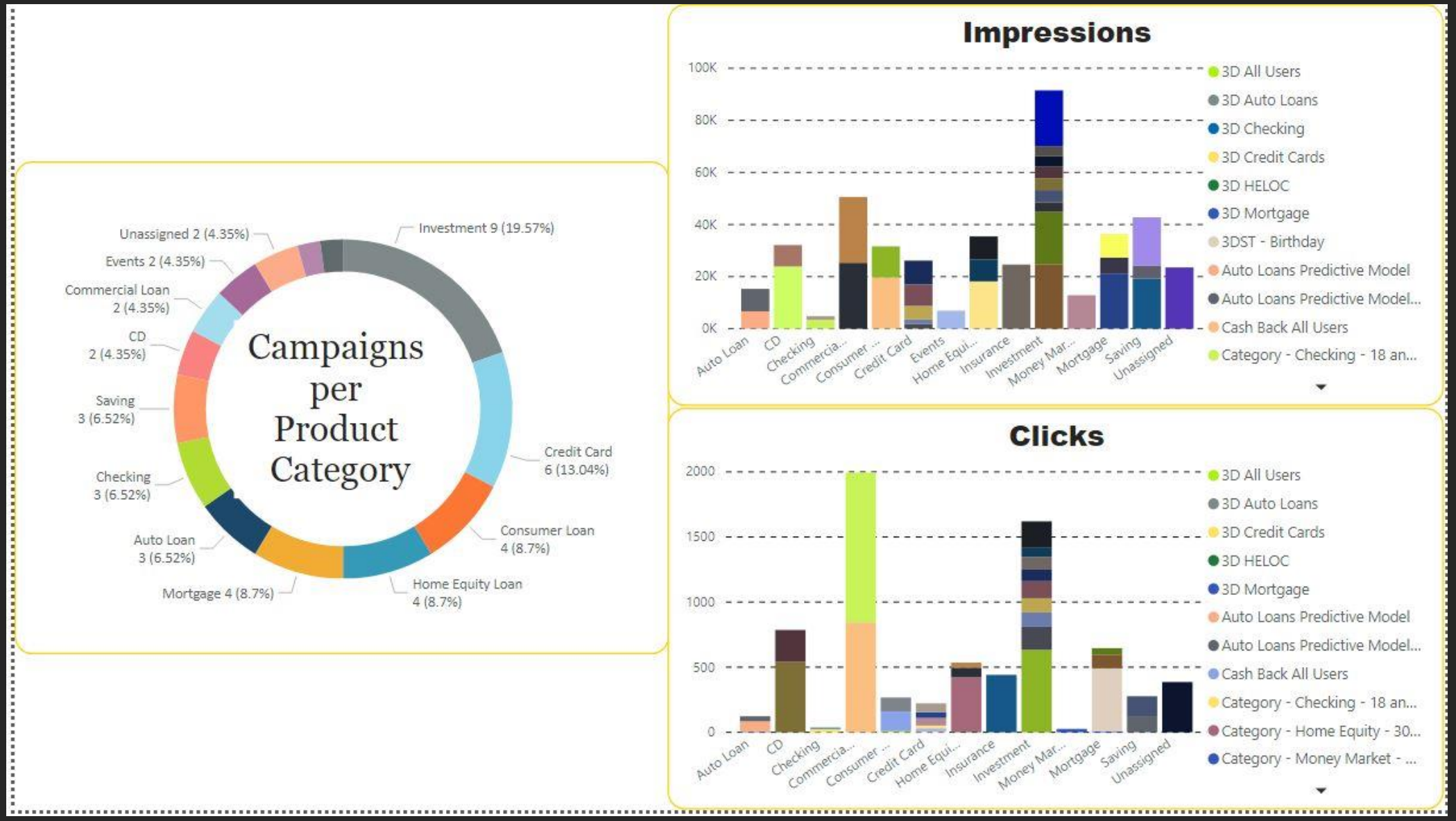

DeepTarget Analytics API to Power BI

Why DeepTarget - Key Differentiators

Why Our Customers Choose Us

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The Business Problem

- If FIs can't sell in digital channels, they *cannot* sell
- Primitive marketing wastes valuable customer impressions & does not scale
- Progress is stifled by long integration and implementation cycles
- FinTechs are increasing competitive pressure on FI performance

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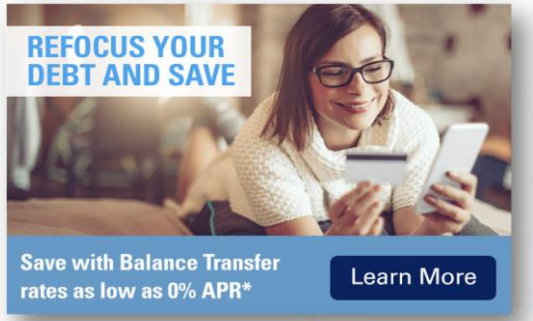

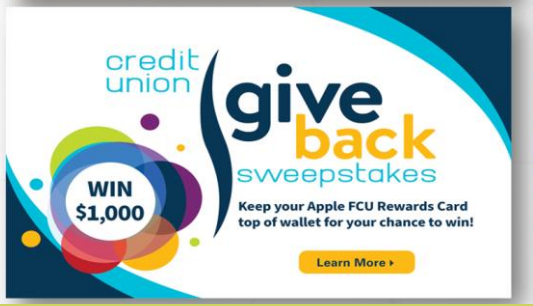

Apple FCU varied their targeted credit card campaigns each quarter with updated member intelligence in DXP. This resulted in a whopping 2,563 new credit card account openings during 2020.

Leapfrog Innovation

- Innovative technology yields 12x increase in leads across all digital channels
- Rapid implementation and impact with 3-month payback
- Used by FIs ranging in size from $20mm to $3.9bn
- Highly automated to reduce FI overhead

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"At Ohio Valley Bank, we learned early on that Deep Target targeted campaigns automatically increased traffic to our online Auto Loan Center by 200% when used.

But imagine our surprise when we implemented our first Deep Target 3D Storyteller campaign using Predictive Model and saw a **1289%** lift in traffic the first month!

And the best part is that those clicks aren't just faceless numbers. They are actionable warm leads funneled directly into our Auto Loan Center and online loan application."

Bryna Butler,
VP – Corporate Communications
OVB - $1 B in assets

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Why DeepTarget: Impactful Results

DeepTarget Customer FI Asset Size < 150 M	DeepTarget Customer FI Asset Size < 500 M	DeepTarget Customer FI Asset Size < 1B	DeepTarget Customer FI Asset Size < 5B
Assets: $101,072,000	**Assets: $404,057,000**	**Assets: $849,886,000**	**Assets: $3.495 Billion**
November 2020	**March 2021**	**March 2021**	**January 2021**
Total Impressions: **863,294**	Total Impressions: **2,224,220**	Total Impressions: **7,668,672**	Total Impressions: **20,623,893**
Unique Impressions: **3795**	Unique Impressions: **11,440**	Unique Impressions: **35,030**	Unique Impressions: **58,123**
Clicks: **281**	Clicks: **858**	Clicks = **2,221**	Clicks: **2,655**
Influenced Conversions: **57** products sold	Influenced Conversions: **185** products sold	Influenced Conversions: **270** products sold	Influenced Conversions: **1,124** products sold
Estimated Monthly Value: **$3,450**	Estimated Monthly Value: **$23,450**	Estimated Monthly Value: **$ 24,350**	Estimated Monthly Value: **$ 94,600**

Note: *Estimated Monthly Values are conservative, based on average returns of* ***loan products sold only****. No deposits or use of cash returns calculated. Ratio of loan to deposit products sold varies from 50 to 100% for these FIs. Detailed product categories and calculations are available for review.*

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Why DeepTarget: Sheer Impact

DXP Aggregate Customer Month End Results				
First Quarter 2021	**Total Impressions**	**Unique Impressions**	**Unique Clicks**	**Influenced Conversions**
January	269,449,755	1,768,880	77,816	7,131
February	263,739,770	1,706,846	68,356	7,009
March	339,764,080	1,932,610	92,020	8,788
Average influenced conversions per customer per month: ~40				

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Rapid Implementation For Rapid Impact

DXP - Rapid Implementation *by Design*:

- As little as two weeks elapsed time
- Provisioning and automation of customer/business intelligence usage
- Setup DXP and quick start campaigns
- Verify Campaign and Train FI Reps
- FI goes live with targeted campaigns and communications

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“DeepTarget DXP led to clicks, it led to engagement, it led to sales... instantly. It’s drastically improved our performance in the past two years for both Online and Mobile engagement and we expect the same thing in 3D StoryTeller.”

Michael Hostetler,
VP – Marketing
Crane - $620 m asset size

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In Summary: Why Customers Choose DeepTarget

- **Real results – the ability to measure *everything* & prove success**
- **Automation - leading to low resource requirements and lower costs**
- **Rapid Implementation for quick impact, especially when pre-integrated**
- **Digital engagement across multiple channels**

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DeepTarget Deployment

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RICH | RELEVANT | RAPID

We do all the heavy lifting.

IMPLEMENTATION FACTS

Average time required to setup:
10 hours!

Typical FI Time Required:
2-4 weeks to go live!

Over 95% Automated!

IT'S EASY TO GET STARTED. AND KEEP IT GOING.

- ✓ We set the system up for our customers
- ✓ We host it.
- ✓ We process the data.
- ✓ We provide a content library rich with proven, successful display ads and images.
- ✓ We provide initial campaigns and messaging.
- ✓ We provide initial targeting rules.
- ✓ We provide the stats and reports to prove that the campaigns are working.
- ✓ We show how they perform versus the competition.

DeepTarget®
Digital Experience Platform

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Customer Usage - Our Experience

- The biggest gap in rapid implementation timeline can be due to first data upload.
- When customers first implement DeepTarget, some take advantage of our pre-defined campaigns.
- 3D StoryTeller use follows traditional campaign ads.
- Our customers are using 3D StoryTeller as follows: They turn on certain campaigns for 3D StoryTeller, Use it for onboarding new members and for helping to navigate to financial product information.
- Predictive Campaigns are beginning to gain broad use.

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The DeepTarget Difference

INTEGRATED: DeepTarget DXP with an Open API is fully integrated with 20 digital banking apps

INNOVATIVE: AI-based smart 3D Stories; advanced marketing tech leapfrogs the norm

IMPACTFUL: Innovative tech yields 12x increase in leads across digital channels

QUICK START: Rapid implementation and impact with 3-month payback demonstrated

AUTOMATED: Highly automated to reduce FI overhead and resources

SCALABLE: Successfully in use by FIs ranging in size from $20mm to $3.9bn

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engage. cross-sell. measure.

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