

D F X G E W J Q
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O T B X G S S P
F H K T D V Z M

ACCESS SOFTEK, INC

Presents a Special Webinar
Jointly with DeepTarget

**How COVID-19 Has
Ignited Digital
Transformation**



(256) 217-4055



success@deeptarget.com

A large, irregular blue splash graphic on the left side of the slide, with a textured, watercolor-like appearance. It has a solid blue center that fades into a lighter blue and white speckled edge.

Today's Agenda

- Welcome and Introductions
- How Covid-19 has ignited digital transformation in the Financial Services Industry
- Customer Panel Discussion
- A Couple of Case Studies
- Elevating and automating customer engagement using Orpheus and MFM
- Closing Remarks

Your FinTech Presenters



Sharon Carnaghi
Vice President of Marketing,
Access Softek
scarnaghi@accesssoftek.com



Preetha Pulusani
CEO, DeepTarget
preetha@deeptarget.com



Helen Triplett
Director – Implementation &
Customer Support, DeepTarget
helen@deeptarget.com

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A Few Words About Our Partnership



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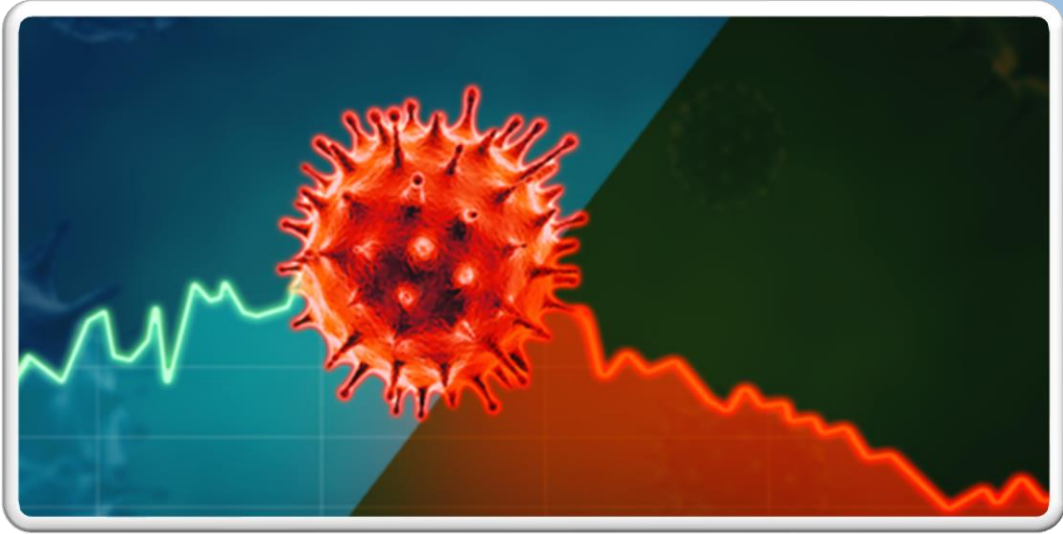


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Access Softek & DeepTarget Better Together

- Reseller partner since 2017
- Combines Access Softek's omnichannel digital banking platform and DeepTarget's personalized target marketing
- Integrated within Mobile Finance Manager™ (MFM) and Orpheus™
- Financial institutions can extend marketing campaigns to mobile AND ensure messaging is highly targeted and relevant
 - Targeted offers delivered via mobile banking, the channel with the highest rate of engagement
 - Reach consumers wherever and whenever they make financial decisions
- Combines big data held by core systems, sophisticated analytics of DeepTarget and the pinpoint precision of Access Softek's mobile banking ad delivery





How Covid-19 has ignited digital transformation in the Financial Services Industry

The Impact on Our Industry: **What We Know**

- Lives and workplaces disrupted
- A climate of fear and uncertainty
- People hungry for curated resources from trusted sources
- More consumers using digital.
- FIs fast-tracking digital use and support.





**WHEN
IS THE END?
#COVID19**

The Impact on our Industry:

What We See You Doing

- Putting your members & customers first
- Proactive, pervasive outreach
- Clarity on financial options
- Education about digital access
- Being a trusted partner in uncertain times.

**People are moving
to digital. *Will they
ever go back?***



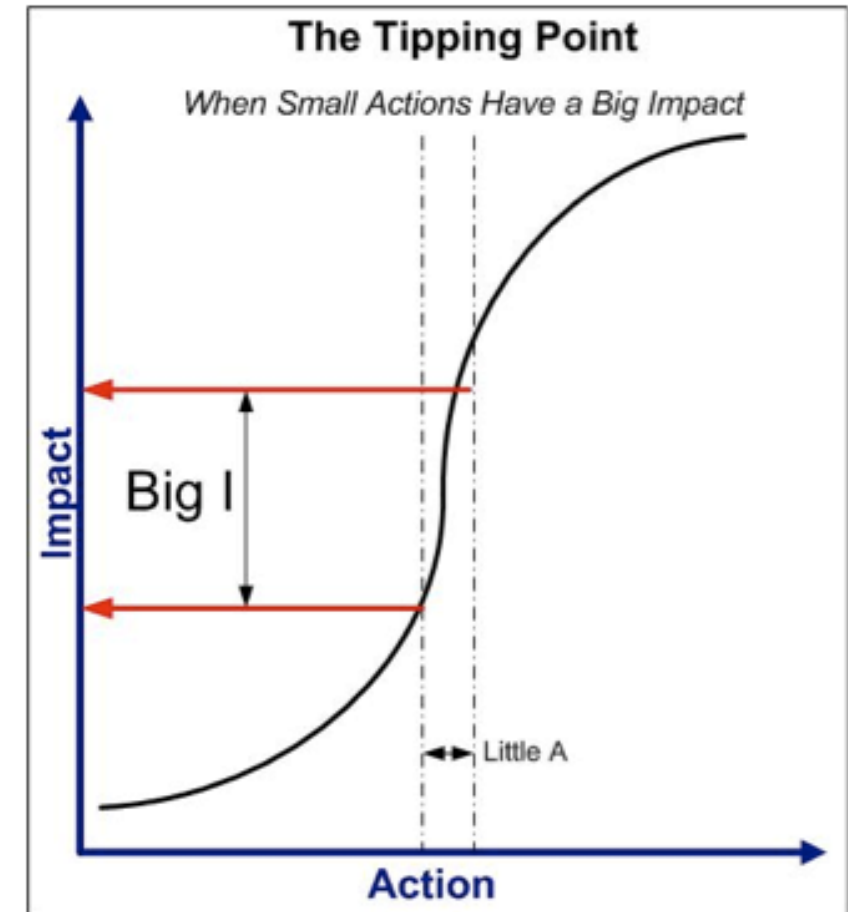
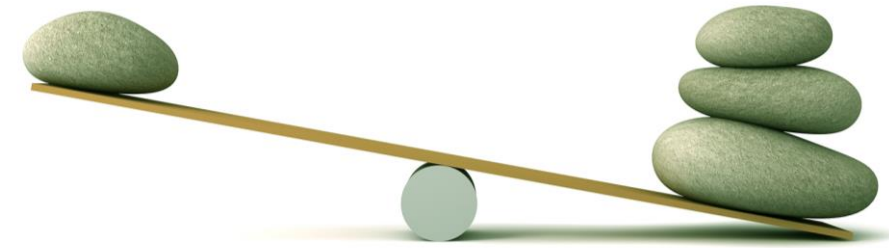
A Recovery Road Map

“No matter whether you are a 100+ year-old bank, community-based credit union, or a pre-seed startup, this is **your chance to shine**.

Be the one-stop source for trusted info on money, credit and community resources.

And forget about going back to “business as usual” (e.g. branch banking). This is the time to break from that system and **embrace the fully-digital future”**.

Source: [Fintech's Third Crisis is Tipping Point to a Digital-Only Future](#)



Introducing Our Customer Panel

How are you
leveraging
digital during
COVID-19?



Michael Hostetler
AVP, Marketing



Julie Donnellon
Marketing Special Projects Manager



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Panel Discussion

Q1

How are you leveraging digital during COVID-19?

How did you decide which messages were most relevant to your community in this unprecedented situation?



Panel Discussion

How are you leveraging digital during COVID-19?

Q2

What are the most successful steps you have taken to assist your community during the Covid Crisis?

What was the customer/member feedback?



Panel Discussion

Q3

How are you leveraging digital during COVID-19?

How did you think about continuing to promote loan and deposit products during such a difficult time? Did you take any specific actions, such as a) skip a pay, b) hardship loans, c) waiving overdraft fees? What were your results?



Panel Discussion

Q4

How are you leveraging digital during COVID-19?

What role did DeepTarget in MFM/Orpheus play in reaching and engaging your members digitally?



Panel Discussion

Q5

How are you leveraging digital during COVID-19?

What sort of tools or reports helped you to set your direction and track your communities' response?



Panel Discussion

How are you leveraging digital during COVID-19?

Q6

How did your senior management team and/or Board respond to your initiatives?



Panel Discussion

Q7

How are you leveraging digital during COVID-19?

How will this change the future of Digital at your FI?



**Thank you,
Michael &
Julie!**



Michael Hostetler
AVP, Marketing



Julie Donnellon
Marketing Special Projects Manager



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Together We Can!

D	F	X	G	E	W	J	Q
R	A	L	N	P	K	Y	H
Z	B	C	C	Y	V	R	U
E	N	J	W	E	Q	M	S
O	T	B	X	G	S	S	P
F	H	K	T	D	V	Z	M

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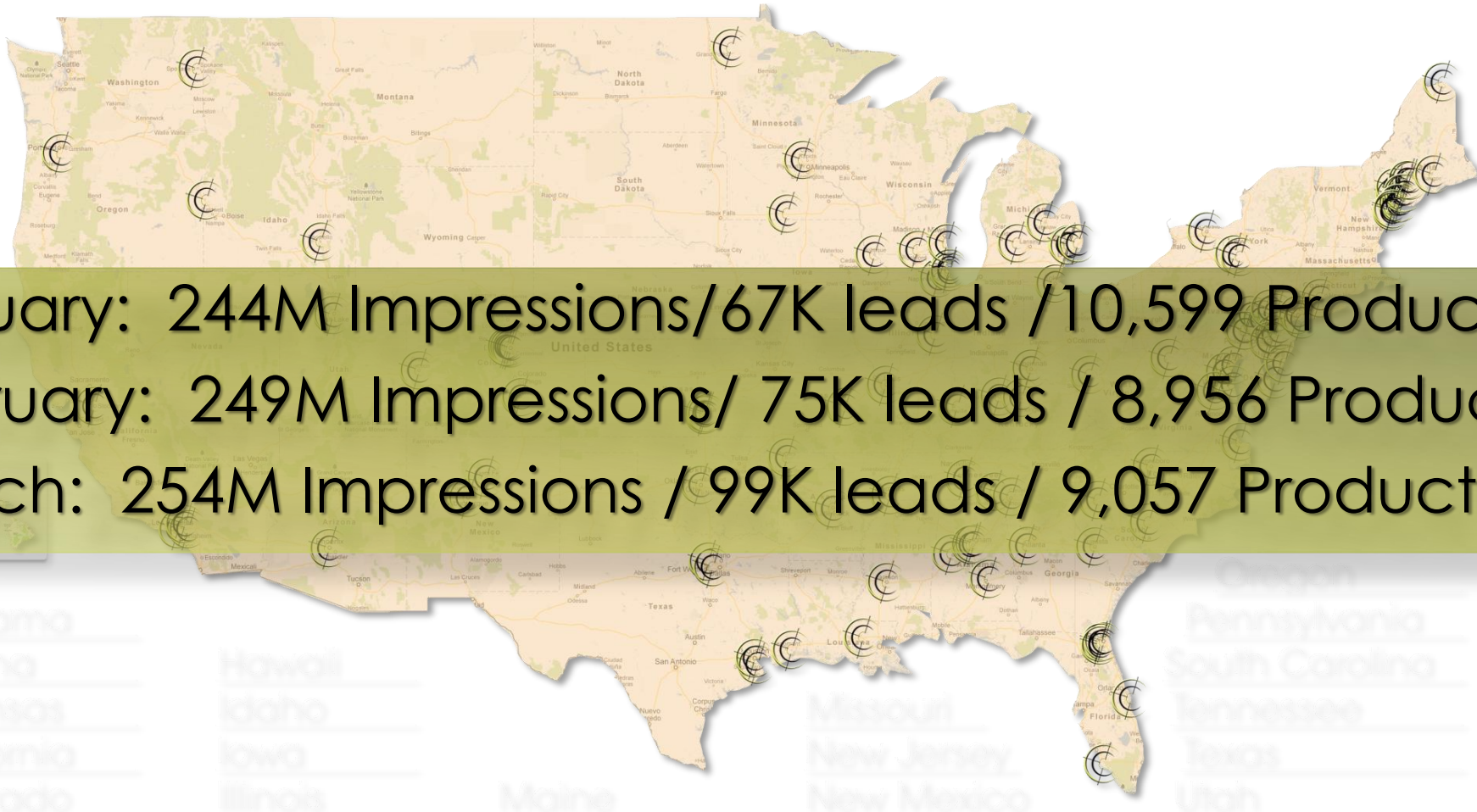


"GOING DARK" IS NOT AN OPTION

LET'S SHINE

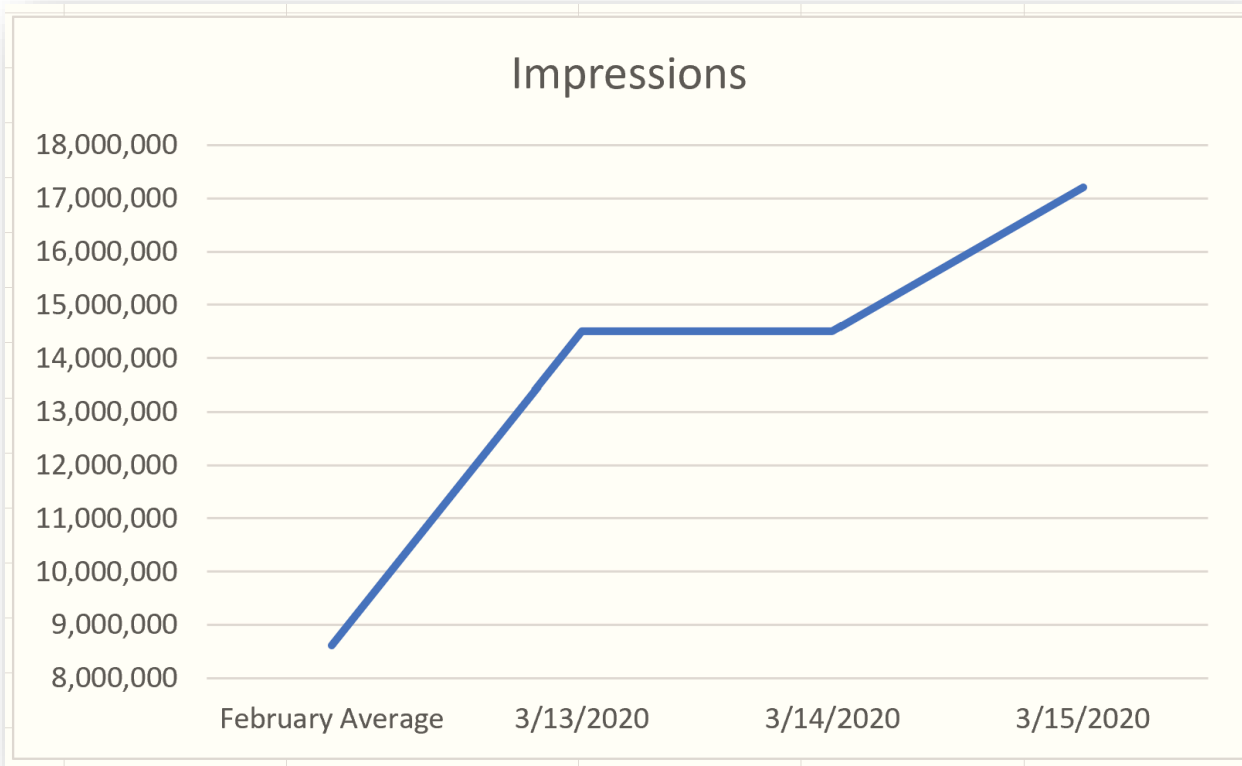
TOGETHER

2020 Performance Analytics – 200+ FIs

- 
- January: 244M Impressions/67K leads /10,599 Products
 - February: 249M Impressions/ 75K leads / 8,956 Products
 - March: 254M Impressions / 99K leads / 9,057 Products



Covid-19 Ignited Digital Transformation



Best practices:

- Leading FIs are aggressively providing relevant Covid and financial information, updated frequently
- Timely, respectful presentation of financial options, such as emergency loans, are driving business
- Lagging FIs passively communicate internal information, such as branch closures



Home

Campaigns ▾

Good mix of relevant communication :

- Community Outreach
- Timely and targeted Products/Services
- Education/Advice

Ad Stats Today



Impressions

Performance Metrics



Data freshness



Campaign freshness



KEI

Campaigns Needing Attention



Checking

This campaign is dated and engagement drop-off is to be expected.

[Update Ad](#)



Commercial Deposits

This campaign is dated and engagement drop-off is to be expected.

[Update Ad](#)

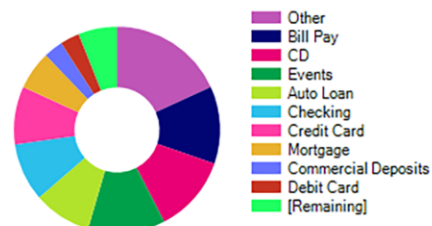


Mortgage

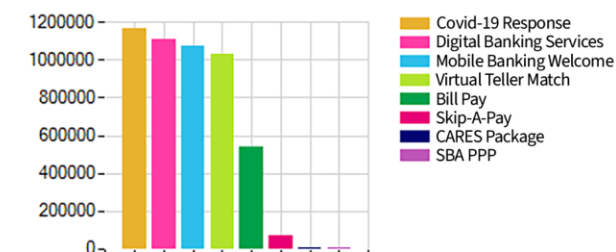
This campaign's engagement is showing a negative monthly trend.

[Update Ad](#)

Published Campaigns by Category



Most Viewed Campaigns in the Last 7 Days



Time to Expand Engagement!

1. Community Outreach ... plus
2. Timely and targeted Products/Services
3. Education/Advice

Ad State



sessions

Performance Metrics



Data freshness



Campaign freshness



KEI

Campaigns Needing Attention



Vacation Loan

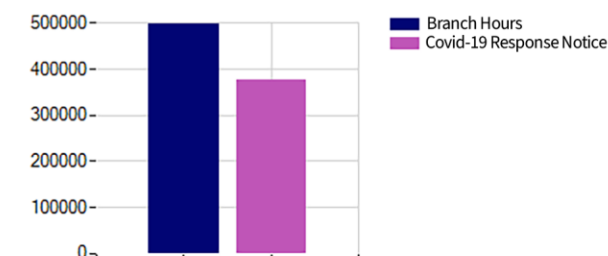
This campaign is dated and engagement drop-off is to be expected.

[Update Ad](#)

Published Campaigns by Category

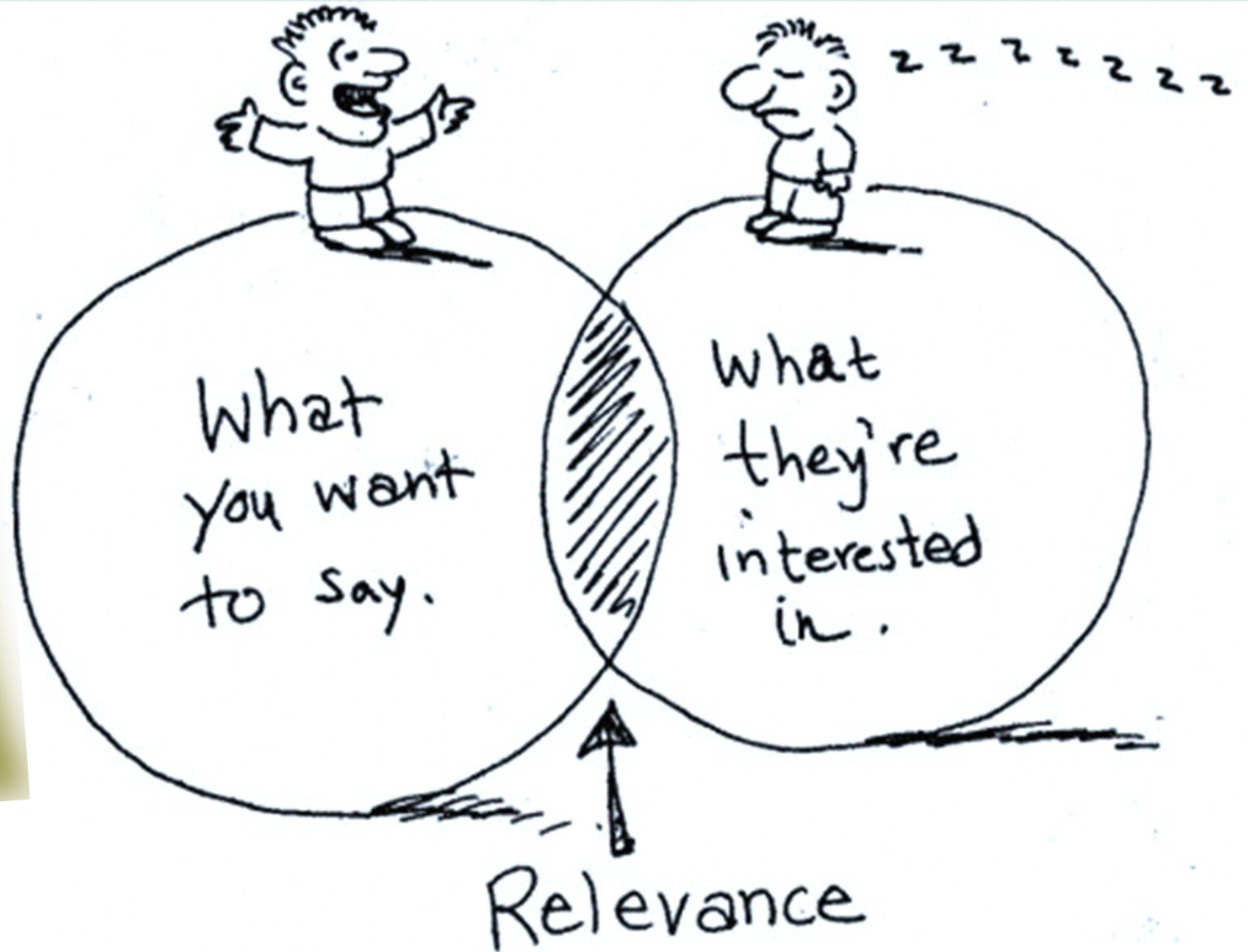


Most Viewed Campaigns in the Last 7 Days



Customer Tolerance

- TRUST exists
- But we have to get it right ... especially today as we emerge from COVID Crisis



Case Review: Increasing Digital Services Awareness

Big dreams start with big rates.
Get 1.20% APY on our 18-month CD.

Get great rates and plenty of help along the way. We're always looking for opportunities to help you grow your money — whether you're saving for retirement or your next big splurge.

PAUSE

Shining Example



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Consumers are Investing in Digital

WELCOME TO OUR
NEW ONLINE BANKING!


VIEW
TUTORIAL


**Member Assistance Campaign
Click Through Rate (CTR) – Over 9%**



MICHIGAN
SCHOOLS & GOVERNMENT
CREDIT UNION

[BANK](#) [BORROW](#) [LEARN](#) [EXPLORE](#)




LOG IN

Need assistance? Check out our tutorials.

View these quick tutorials to help you register and use our new mobile app and online banking.

- ▼ Register for Online and Mobile Banking
- ▼ Logging in and Using Quick Login with MSGCU's Online Banking
- ▼ Navigating Around MSGCU's New Online and Mobile Banking
- ▼ Setting Up Alerts
- ▼ Paying Friends or Family Members in Your MSGCU Account
- ▼ Locking and Unlocking Your Credit or Debit Cards
- ▲ Transferring Funds from One MSGCU Account to Another

Transferring money from one MSGCU account to another has never been easier. Simply choose which account you're transferring from and where it's going. You can even set up recurring transfers to help you meet your savings goals! Use the same process for paying your MSGCU credit card or even paying your MSGCU loan.



Information as a Service

Best Practices

- ☒ Prioritization
- ☐ Personalization
- ☒ Schedule Reports (weekly)
- ☒ Broad Mix of Campaign Types
- ☒ Ad Rotation
- ☒ Banners running in all available channels
- ☒ Products assigned appropriately for each campaign
- ☒ Product Codes mapped to account types
- ☒ All users campaign running in all channels
- ☒ ADA text
- ☒ Included Rates on Banners

DON'T MISS
THESE GREAT
CD RATES!

1.20%
APY
18 MONTHS

1.00%
APY
9 MONTHS

LEARN
MORE



DON'T FORGET TO SET UP
YOUR ACCOUNT ALERTS.

GET
STARTED



GET 1% CASH BACK ON TRANSFERS.
PLUS, a \$50 BONUS.

LEARN MORE

WELCOME TO OUR
NEW ONLINE BANKING!

VIEW
TUTORIAL



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Another Shining Example



[Bank](#) [Borrow](#) [eServices](#) [Resources](#) [Business](#)

[Online Banking](#)

Case Review: Right Time Welcomed Offers

Savings and Checking Solutions

Enjoy personal banking services that make life easier. Partner Colorado takes personal interest in your financial needs, striving to deliver products and services to help you move ahead financially, while saving you time and money. Check out our current rates to see how rewarding saving can be.

[Savings Rates »](#)

[Savings Accounts »](#)

Check out our current rates to see just how rewarding saving

Partner Colorado has a variety of savings accounts to help you

TRUST & RELEVANCE = A Great Combination



- OLB and Mobile
- 8.2% CTR (in March)



A screenshot of the Partner Colorado Credit Union website. The top banner features the "Emergency Relief Loan" text in a blue script font over a background of two hands shaking. Below the banner is a navigation bar with links: "Open an Account", "Apply for Loan", "Locations & ATMs", "Contact Us", "About Us", and "Español". A search bar is on the right. The main content area is titled "Special Coronavirus Relief Programs" and includes a section for the "Emergency Relief Loan" with details about the 0% APR offer. A "Live Chat" button is visible on the left side of the page. At the bottom, there is a "Need Assistance?" chat prompt with a "Start Chat" button.

TRUST & RELEVANCE = A Great Combination



- 13.52% in Q1

- 6.9% CTR (in March)

A horizontal banner with an orange border. On the left is the Partner logo. Next to it is a white circle containing the text "FREE Financial Wellness Counseling". To the right of the circle is the text "Become your best financial self!" in a red script font, followed by "Improve your financial health in 2020" in a black sans-serif font. The background of the banner shows a smiling couple high-fiving. A small "Details Here" link is in the bottom right corner.

A horizontal banner with a red border. On the left is the Partner logo. Next to it is a red circle containing the text "Hurry, Offer Ends May 30!". To the right of the circle is the text "Here's the Scoop!" in a blue script font, followed by "Open a New Youth Account for a chance to win \$1,500 worth of fun!" in a black sans-serif font. The background of the banner shows a smiling child holding an ice cream cone. A small "Details Here" link is in the bottom right corner.

A close-up view of the Financial Wellness Counseling banner. It features the Partner logo, a white circle with "FREE Financial Wellness Counseling", the text "Become your best financial self!" in red script, and "Improve your financial health in 2020" in black. The background is a photo of a smiling couple high-fiving. A "Details Here" link is in the bottom right corner.

A close-up view of the "Here's the Scoop!" banner. It features the Partner logo, a red circle with "Hurry, Offer Ends May 30!", the text "Here's the Scoop!" in blue script, and "Open a New Youth Account for a chance to win \$1,500 worth of fun!" in black. The background is a photo of a smiling child holding an ice cream cone. A "Details Here" link is in the bottom right corner.

An Engaged & Interested Audience

- 4.32% CTR (in March)



Loan Payment Relief

If you're facing hardship due to the Coronavirus and find it hard to make your loan payment with us, let us help.

[Details Here](#)

Best Practices

- ☐ Prioritization
- ☐ Personalization
- ☐ Schedule Reports (weekly)
- ☒ Broad Mix of Campaign Types
- ☒ Ad Rotation
- ☒ Banners running in all available channels
- ☐ Products assigned appropriately for each campaign
- ☒ Product Codes mapped to account types
- ☒ All users campaign running in all channels
- ☐ ADA text

Loan Payment Relief

If you're facing hardship due to Coronavirus, let us help.

[Details Here](#)



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Elevating and automating customer engagement using Orpheus and MFM

D	F	X	G	E	W	J	Q
R	A	L	N	P	K	Y	H
Z	B	C	C	Y	V	R	U
E	N	J	W	E	Q	M	S
O	T	B	X	G	S	S	P
F	H	K	T	D	V	Z	M

A C C E S S S O F T E K , I N C



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Orpheus + DeepTarget

The screenshot displays the Orpheus web application interface. At the top, the Orpheus logo is on the left, and user information (Welcome, imuser1), messages/alerts, language (English), and sign-out options are on the right. A navigation sidebar on the left includes links for Accounts, Overview, History, New Account, Messages & Alerts, Transfers & Payments, Settings, Family & Friends, and Card Controls. The main content area features a banner for Steven with the text "Your Own Car. Sweet. Apply here for a payment you can afford >>". Below this is the "Accounts Overview" section, which includes links to add new accounts, show hidden accounts, and edit hidden accounts. The accounts are displayed in a grid of cards, each showing the account type, name, balance, and available funds. The cards are: SAVINGS (SAVINGS XX963 - S:0001 - Savings), CLASSIC CHECKING (CLASSIC CHECKING XX963 - S:0020 - C...), 60 MONTH JUMBO CERTIFICATE (60 MONTH JUMBO CERTIFICATE XX96...), IRA SAVINGS (IRA SAVINGS XX963 - S:0200 - Savings), 60 MONTH IRA CERTIFICATE (60 MONTH IRA CERTIFICATE XX963 - S...), 72 MONTH NEW AUTO (72 MONTH NEW AUTO XX963 - L:0020...), 30 YEAR FIXED MORTGAGE (30 YEAR FIXED MORTGAGE XX963 - L:0...), and VISA (VISA XX963 - 7330 - CreditLine). On the right side of the interface, there are four scenic images with captions: Yellowstone, Yosemite, Grand Canyon, and Mammoth Cave. Below these images is a promotional banner that reads "We'll Get You There Apply Here for a Vacation Loan >>". At the bottom of the interface, there are links for Terms of use, Privacy policy, and Contact us, along with a copyright notice for 2019 Access Softtek.

ORPHEUS™

Welcome, imuser1 | 0 Messages & Alerts | English | Sign out

Accounts Overview

+ Add new account | Show hidden accounts | Edit hidden accounts

SAVINGS
SAVINGS XX963 - S:0001 - Savings
\$12,228.89
\$12,228.89 available
Since last login | + \$12,228.89

CLASSIC CHECKING
CLASSIC CHECKING XX963 - S:0020 - C...
\$4,280.00
\$4,280.00 available
Since last login | + \$4,280.00

60 MONTH JUMBO CERTIFICATE
60 MONTH JUMBO CERTIFICATE XX96...
\$24,048.65
\$14,048.65 available
Since last login | + \$24,048.65

IRA SAVINGS
IRA SAVINGS XX963 - S:0200 - Savings
\$26,389.89
\$26,389.89 available
Since last login | + \$26,389.89

60 MONTH IRA CERTIFICATE
60 MONTH IRA CERTIFICATE XX963 - S...
\$28,000.00
\$27,000.00 available
Since last login | + \$28,000.00

72 MONTH NEW AUTO
72 MONTH NEW AUTO XX963 - L:0020...
\$39,394.25
\$0.00 available | \$55,141.72 past due | \$911.99 due 05/22/2010
Since last login | + \$39,394.25

30 YEAR FIXED MORTGAGE
30 YEAR FIXED MORTGAGE XX963 - L:0...
\$516,375.91
\$0.00 available | \$338,777.60 past due | \$3,024.80 due 05/16/2010
Since last login | + \$516,375.91

VISA
VISA XX963 - 7330 - CreditLine
\$2,054.07
\$12,000.00 available | \$61.62 due 05/15/2010
Since last login | + \$2,054.07

Yellowstone
Yosemite
Grand Canyon
Mammoth Cave

We'll Get You There
Apply Here for a Vacation Loan >>

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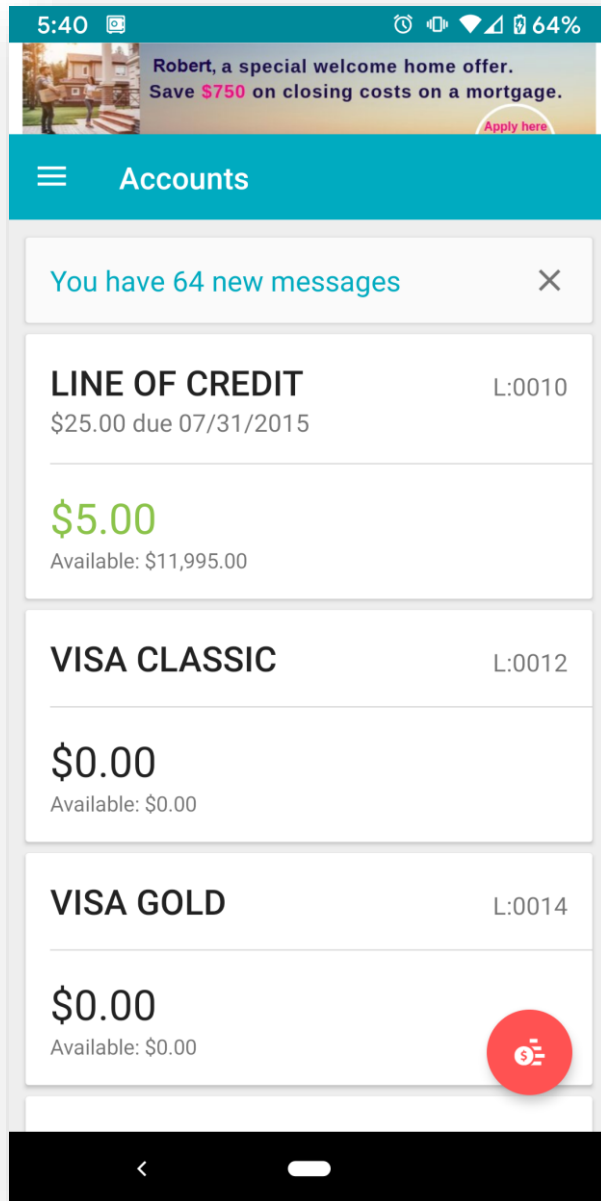
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What Mobile Banking Customers See – MFM + DeepTarget

*Design Once,
Engage Everywhere™*



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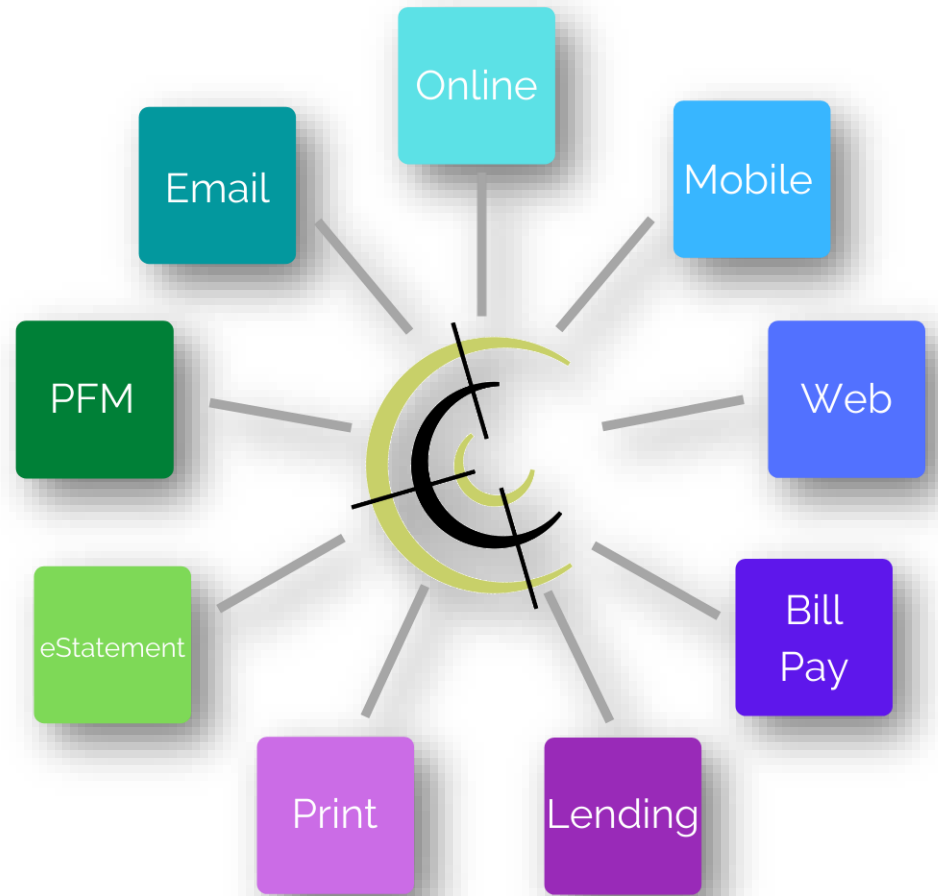


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The DeepTarget Campaign Object

Key Elements

- Name
- Category: Auto Loan, Credit Card, CD...
- Target audience: All users, Targeted by Rule, Targeted by List...
- Channels: OLB, Mobile, PFM, Email, Web, BillPay, eStatements...
- Start date, end date
- Banner ads
- Click actions



Auto Loan Offer
Good Credit Score

Credit > 699
And No Auto Loan



Bob - You are pre-approved for our special auto loan rate of 1.99%!

APPLY NOW!



www.deeptarget.com



(256) 217-

Campaign Examples

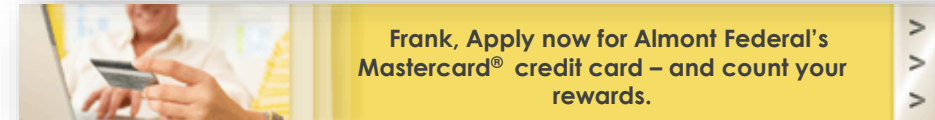
Six types of Intelligent Campaigns :

1. By Rule
2. By List
3. Non-Targeted
4. All Users
5. Opt-Out
6. Global Override

Auto Loan Campaign
All User



Credit Card Campaign
Targeted By Rule



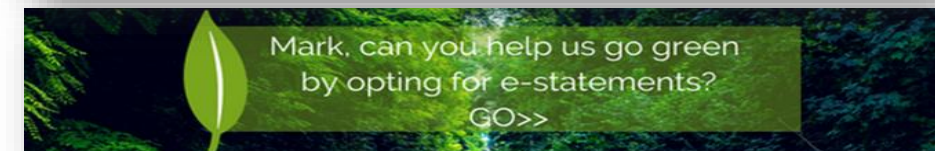
Consumer Loan Camp1
Targeted By List



Consumer Loan Camp2
All User



eStatement Campaign
Targeted By Rule



Outreach Campaign
All User



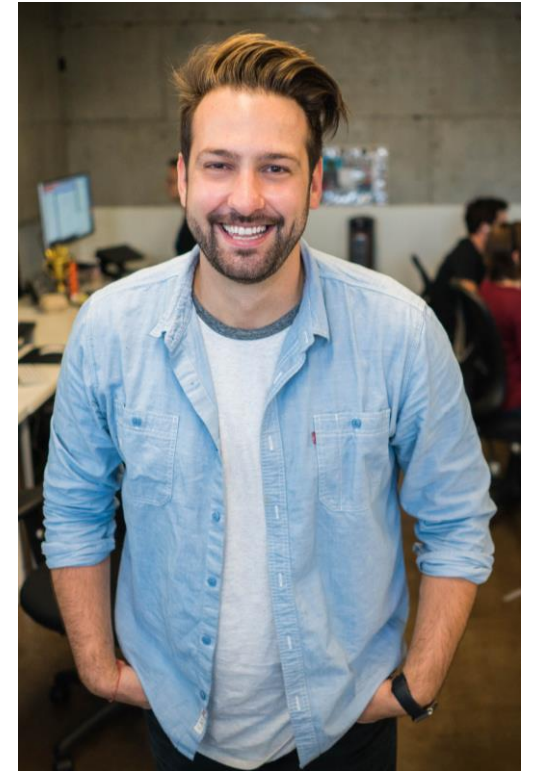
How DeepTarget Works

Elisa:



- ✓ Elisa is married
- ✓ Has two children, ages 12 and 18
- ✓ Has a credit rating of 650
- ✓ Her birthday is this week!

Frank:



- ✓ Frank is single
- ✓ Has an auto loan that matures in six months
- ✓ Has a credit rating of 720



Rules and Campaign Stack at Work for a Personalized Experience



Auto Loan Campaign
Targeted by Rule

Credit Card Campaign
Targeted By Rule

HELOC Campaign
Targeted By List

Consumer Loan Camp2
All User

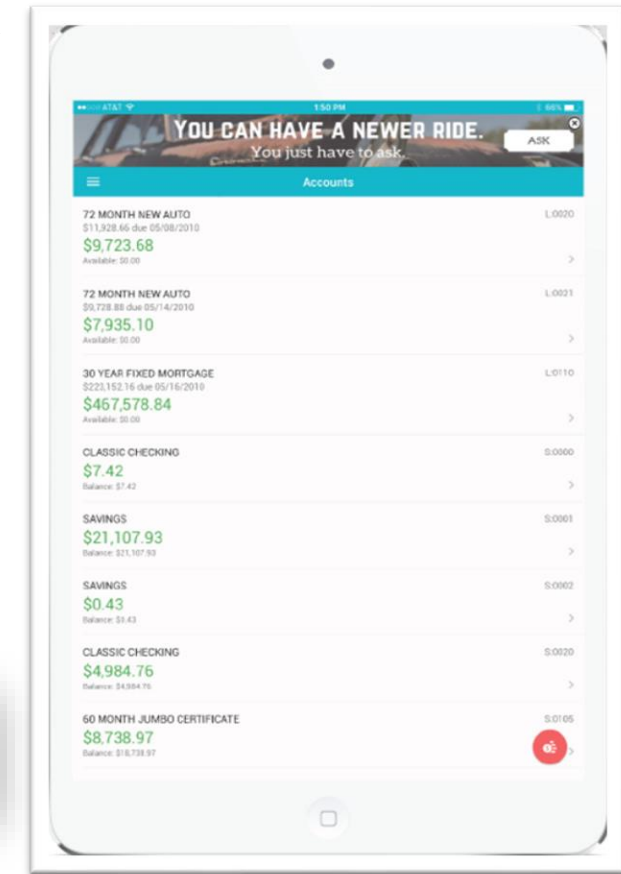
Banners rotate as
Frank navigates
within digital
banking

You are pre-approved for an auto loan
2.99% APR
*terms and conditions apply
Apply Now

Frank, get **\$200** cash back with
credit card bonus points.
Learn more

Frank, use your home's equity.
Build a MAN cave.
Apply here

you are **HERE** or or or
#VACATIONTIME
Click for Details



Relevant Communication: What Happens with 1 click

Lead capture
notification
email sent to
lending officer

Redirect to URL,
such as product or
loan application
page on website

DeepTarget
Performance
Analytics track
impressions and
clicks

Send Click-to-
Email™ triggered
follow-up email to
account-holder



Intelligence-Driven Targeting Engine

- Campaigns
- Rules
- Lists
- Priorities

User Data:

- ID
- Demographics
- Financial
- & More



A Smart Campaign Stack:
The list of eligible campaigns
for each user id.



Ad Stats Today

Clicks: 44



Impressions

Performance Metrics



Data freshness



Campaign freshness



KEI

Recently Modified Campaigns



Investment Services

Last Published: 4/1/2020 Audience: All Users



Category - Credit Card - 2...

Last Published: NA Audience: Targeted by Rule



Category - Home Equity - 3...

Last Published: 3/20/2020 Audience: Targeted by Rule



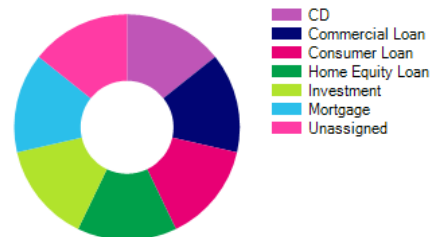
Campaigns Needing Attention

CashBack

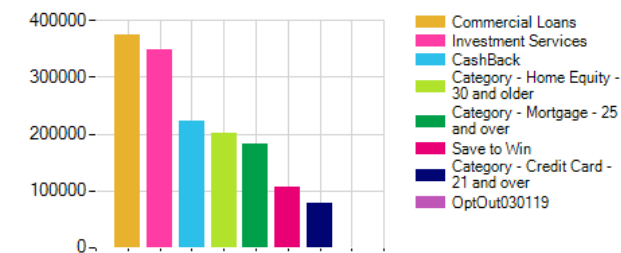
This campaign's engagement is showing a negative monthly trend.

[Update Ad](#)







Published Campaigns by Category



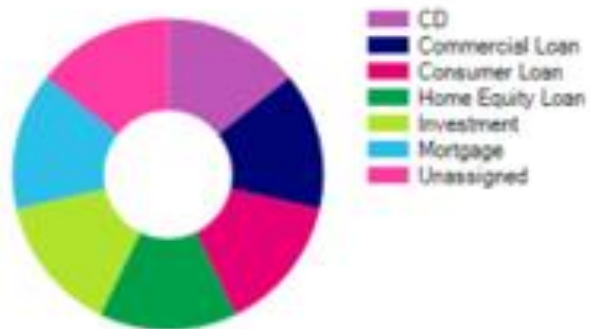
Most Viewed Campaigns in the Last 7 Days



Recently Modified Campaigns

			Invest Last P		Campaign Settings		
			Categ Last P		Ad Settings		
			Categ Last P		Email Settings		
			Categ Last P		Campaign Performance		
					Copy Campaign		
					Delete Campaign		

Published Campaigns by Category





Recently Modified Campaigns

			Investment Services Last Published: 4/1/2020		
			Category - Credit Card - 2... Last Published: NA		
			Categ Last P		

Published Campaigns by Category



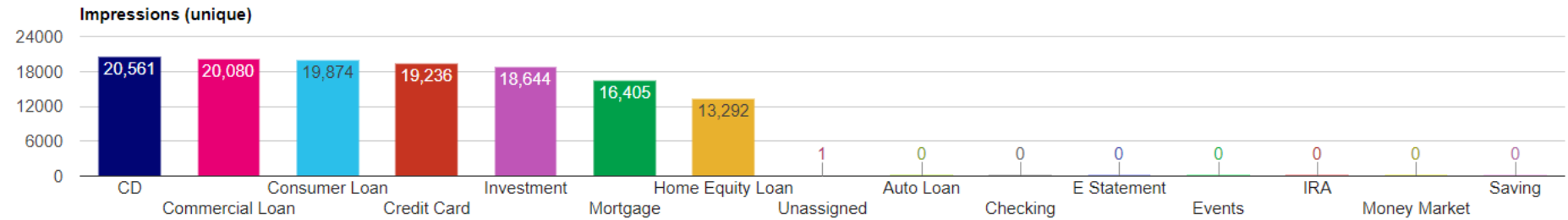
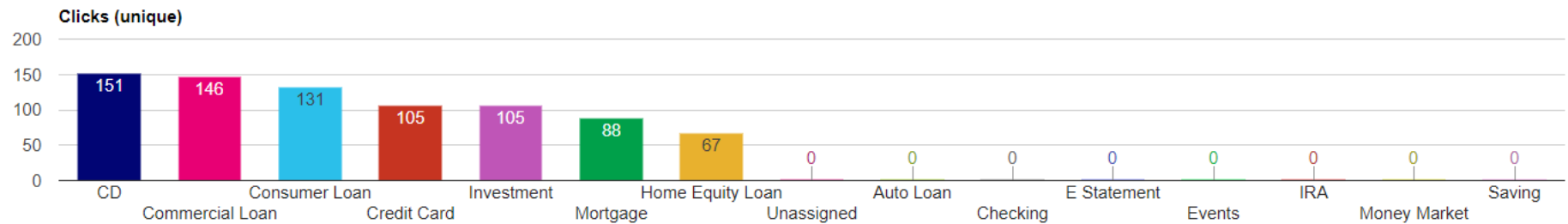
	Campaign Settings
	Ad Settings
	Email Settings
	Build Rule
	Campaign Performance
	Copy Campaign
	Delete Campaign



- [Home](#)
- [Campaigns](#)
- [Reports](#)
- [Settings](#)
- [Support](#)

Campaign Category Analytics ?

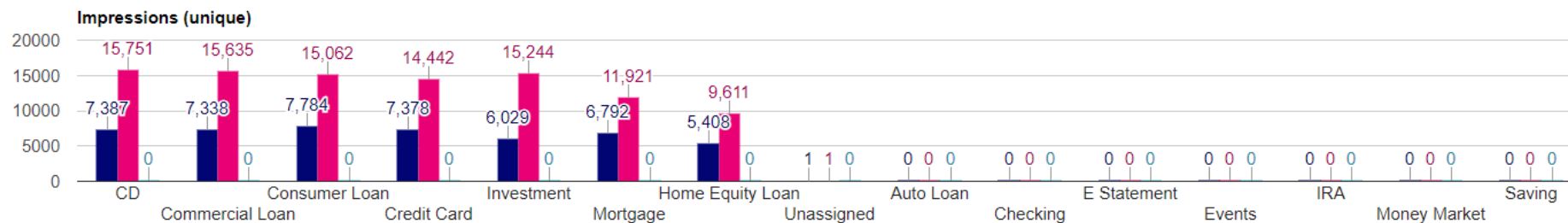
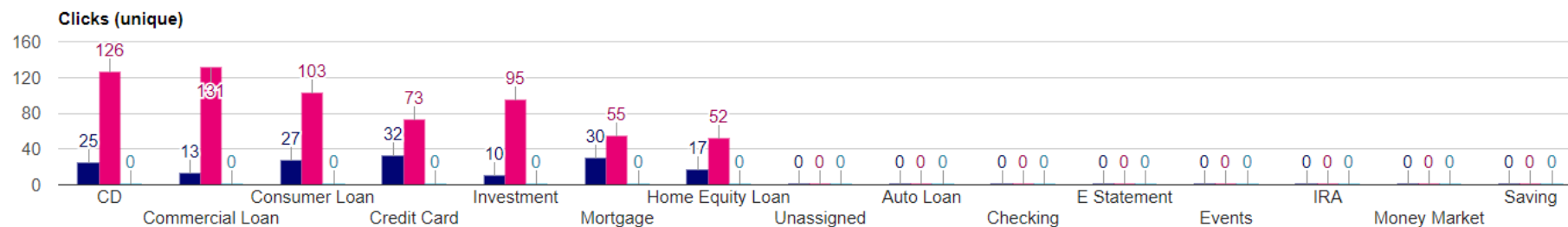
Start Date: 03/02/2020 | End Date: 04/01/2020 | [Apply](#) | Channel: All | Category: All | [Bar Chart](#) | [Line Chart](#) | [Table](#) | [Compare Channels](#) | [Show Data Labels](#)


[Export Data](#)
[Export Chart](#)

[Export Data](#)
[Export Chart](#)


- [Home](#)
- [Campaigns](#)
- [Reports](#)
- [Settings](#)
- [Support](#)

Campaign Category Analytics ?

Start Date: 03/02/2020 End Date: 04/01/2020 [Apply](#) Channel: All Category: All
 [Bar Chart](#) [Line Chart](#) [Table](#)
 ☒ Compare Channels ☒ Show Data Labels


[Export Data](#)
[Export Chart](#)

[Export Data](#)
[Export Chart](#)


- [Home](#)
- [Campaigns](#)
- [Reports](#)
- [Settings](#)
- [Support](#)

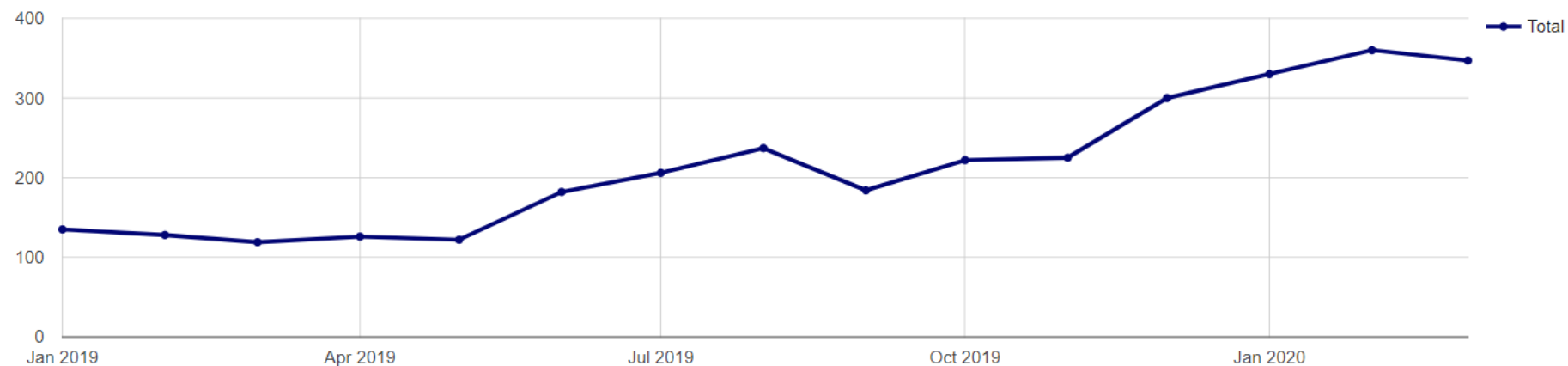
Influenced Conversions ?

Start Date: 01/01/2019 End Date: 03/31/2020 [Apply](#)
 Account Type: All
 Product Code:
 [Campaign](#) [Product](#) [Impressions](#) [Clicks](#) [Either](#)



☐ Impressions
 ☐ Clicks
 ☒ Either

Influenced Conversions

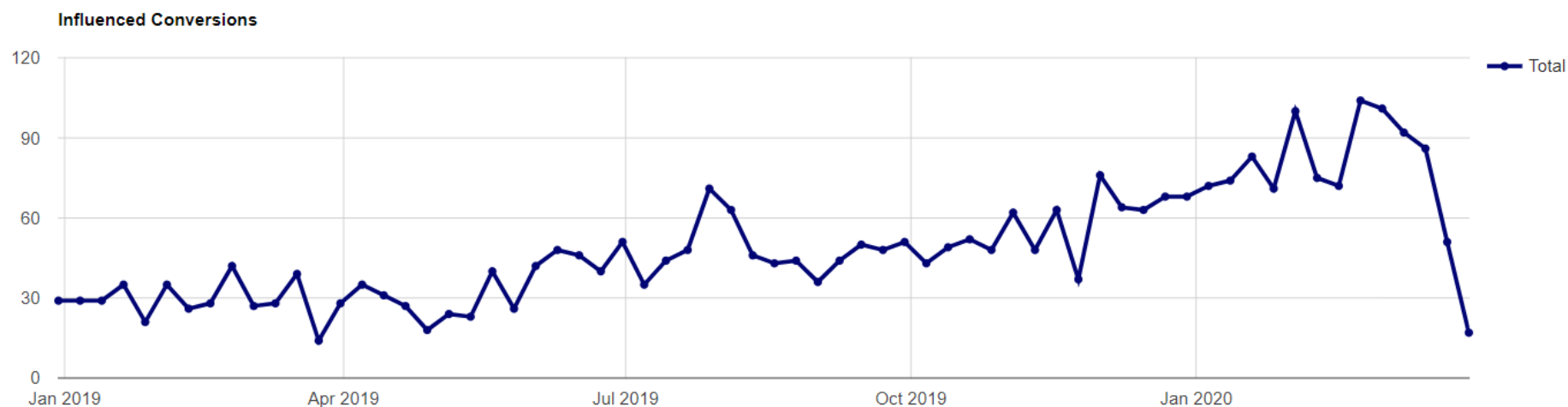

[Export Data](#)
[Export Chart](#)


- Home
- Campaigns
 - Add Campaign
 - All Campaigns
 - Targeted by Rule
 - Targeted by List
 - All Users
 - Non-Targeted
 - Opt-out
 - Global Override
- Reports
- Settings
- Support

Influenced Conversions ?

Start Date: 01/01/2019 End Date: 03/31/2020 [Apply](#)
 Account Type: All
 Product Code:
 Campaign Product

☐ Impressions
☐ Clicks
☒ Either



[Export Data](#)
[Export Chart](#)



DIGITAL MARKETING REPORT

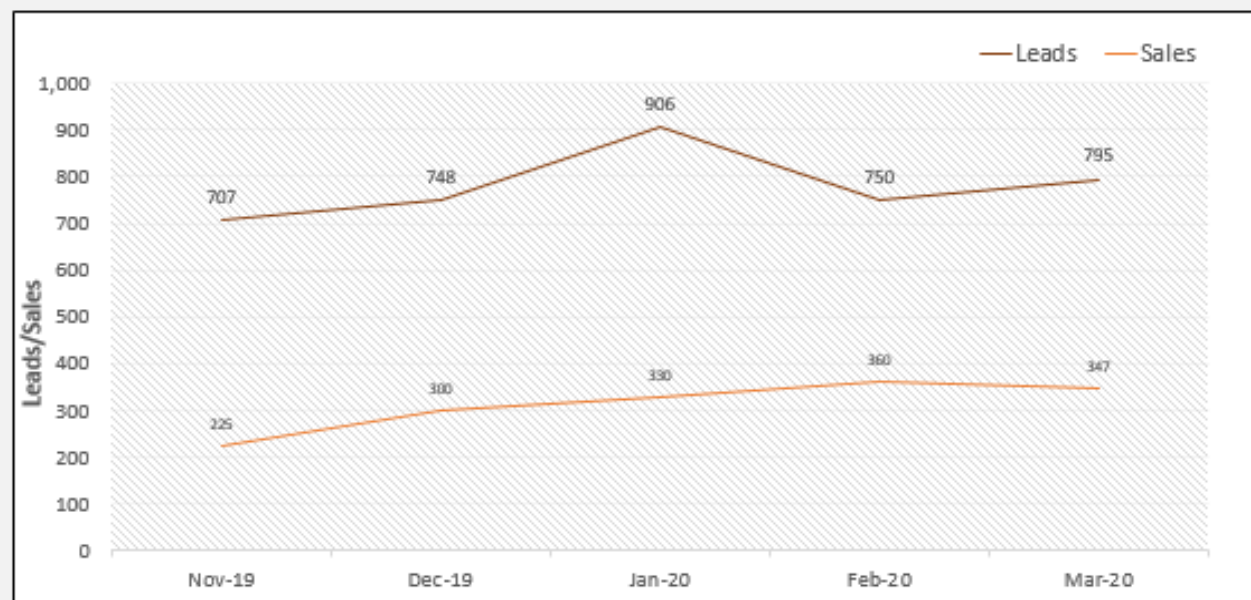
CAMPAIGN PERFORMANCE

Month	Channel	Campaigns	Total Impressions	Unique Users (Impressions)	Unique Clicks	KEI™	KEI Rating	Leads	Sales	KMI™	KMI Rating
Nov-19	OLB	9	2,175,580	7,923	129	61	EXCELLENT	707	225	93	OUTSTANDING
	Mobile	9	4,564,634	16,009	578	28	OUTSTANDING				
	Combined	18	6,740,214	20,823	707	29	OUTSTANDING				
Dec-19	OLB	10	2,225,443	7,966	130	61	EXCELLENT	748	300	70	OUTSTANDING
	Mobile	10	4,841,567	16,281	618	26	OUTSTANDING				
	Combined	20	7,067,010	21,066	748	28	OUTSTANDING				
Jan-20	OLB	9	2,408,757	8,451	184	46	OUTSTANDING	906	330	65	OUTSTANDING
	Mobile	9	4,559,837	16,459	722	23	OUTSTANDING				
	Combined	18	6,968,594	21,466	906	24	OUTSTANDING				
Feb-20	OLB	9	2,197,591	8,190	125	66	EXCELLENT	750	360	59	OUTSTANDING
	Mobile	9	4,625,758	16,479	625	26	OUTSTANDING				
	Combined	18	6,823,349	21,336	750	28	OUTSTANDING				
Mar-20	OLB	7	2,171,657	8,207	156	53	EXCELLENT	795	347	62	OUTSTANDING
	Mobile	7	4,744,854	16,699	639	26	OUTSTANDING				
	Combined	14	6,916,511	21,601	795	27	OUTSTANDING				

KEI: Key Engagement Indicator

KMI: Key iMpression Indicator

MONTHLY TRENDS



MAR-20 SALES TRANSACTIONS

Loan/Account Type	Newly Opened
CD	100
Checking	13
Commercial Deposit	2
Commercial Loan	14
Consumer Loan	91
Mortgage	1
New Auto	15
Unassigned	1
Used Auto	110
Total	347

Schedule Report 

Schedule a report

[Create New](#)**Daily Lead Report**
Scheduling report...
2 recipients

Daily



Helpful Information

For additional security, always consider using password encryption when you schedule your click reports. Make sure not to share your password with anyone over the internet or through an email.

Set the frequency of your reports based on the volume of clicks you receive on your campaigns. If you receive more than 30 clicks per day, we recommend setting the frequency to daily.

Legend:

- Daily
- Weekly
- Monthly



Schedule Report ?

Schedule a report

Schedule a Report

Report Type:

Click Report

Add another recipient ?

Report name

Daily Lead Report

Recipient Name

Helen Triplett

Jill Homan

Recipient Email

helen@myfi.com

jill@myfi.com

Frequency:

Send this report regularly:

daily

at 9

am

☒ Encrypt with password

.....

Schedule

Helpful Information

For additional security, always consider using password encryption when you schedule your click reports. Make sure not to share your password with anyone over the internet or through an email.

Set the frequency of your reports based on the volume of clicks you receive on your campaigns. If you receive more than 30 clicks per day, we recommend setting the frequency to daily.

Legend:

- Daily
- Weekly
- Monthly



Home

Campaigns

Add Campaign

All Campaigns

Targeted by Rule

Targeted by List

All Users

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Support

Campaigns ?

All Audience Types

All Campaigns

All Categories

Sort Last Published: New to Old

+ -



Investment Services

Last Published: 4/1/2020 Audience: All Users Category: Investment

OLB Ads: 1 Web Ads: 0 eDocument Ads: 0 Notification Email: On
Mobile Ads: 4 Click-to-Email: Off


Category - Home Equity - 30 and older

Last Published: 3/20/2020 Audience: Targeted by Rule Category: Home Equity Loan

OLB Ads: 1 Web Ads: 0 eDocument Ads: 0 Notification Email: Off
Mobile Ads: 4 Click-to-Email: Off


Commercial Loans

Last Published: 2/28/2020 Audience: All Users Category: Commercial Loan

OLB Ads: 1 Web Ads: 0 eDocument Ads: 0 Notification Email: Off
Mobile Ads: 4 Click-to-Email: Off


Category - Mortgage - 25 and over

Last Published: 2/25/2020 Audience: Targeted by Rule Category: Mortgage

OLB Ads: 1 Web Ads: 0 eDocument Ads: 0 Notification Email: Off
Mobile Ads: 4 Click-to-Email: Off


Save to Win

Last Published: 2/5/2020 Audience: Targeted by Rule Category: CD

OLB Ads: 1 Web Ads: 0 eDocument Ads: 0 Notification Email: Off
Mobile Ads: 4 Click-to-Email: Off


OptOut030119

Last Published: 12/5/2019 Audience: Opt-out Category: Unassigned

OLB Ads: 1 Web Ads: 0 eDocument Ads: 0
Mobile Ads: 4

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Ad Stats Today


Clicks: 44

Impressions: 204,447

Recently Modified Campaigns

- Investment Services**
Last Published: 4/1/2020 Audience: All Users
- Category - Credit Card - 2...**
Last Published: NA Audience: Targeted by Rule
- Category - Home Equity - 3...**
Last Published: 3/20/2020 Audience: Targeted by Rule

Published Campaigns by Category



Category	Count
CD	1
Commercial Loan	1
Consumer Loan	1
Home Equity Loan	1
Investment	1
Mortgage	1
Unassigned	1

Performance Metrics

Data freshness

Campaign freshness

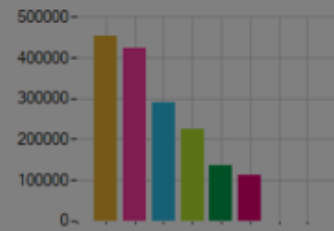
KEI

Needing Attention

Our metrics show that none of your campaigns need attention.

Keep up the good work!

Campaigns in the Last 7 Days



Campaign	Count
Commercial Loans	450,000
Investment Services	420,000
CashBack	280,000
Category - Mortgage - 25 and over	220,000
Category - Home Equity - 30 and older	130,000
Save to Win	110,000
OptOut030119	100,000
Category - Credit Card - 21 and over	90,000

Add Campaign


DT Test Outreach

Other

All Users

Create

OLB Mobile Email Web eDocument

Campaign: DT Test Outreach 

Create New Banner



Create New Banner

Campaign: [DT Test Outreach](#)

Select Size

☒ **728x90**☐ Custom

Width

Height

728

90

Type of Banner

☐ Upload HTML☒ **Choose from Library**☐ Upload your Design☐ Blank Canvas

Helpful Information

For online banking, your default banner size is pre-selected. For mobile banners, we recommend always creating a 320x50 banner as it will fit on all devices.

Note that you are restricted from creating two banners of the same size in the same channel.

If you have created your own graphics outside of the application, select "Upload your Design".

If you want to use a banner from our Banner Library, select "Choose from Library".

If you have an HTML banner or want to create an interstitial banner, select "Upload HTML".

If you want to create your banner entirely within the application, select "Blank Canvas".

[Next](#)[Cancel](#)

Library Banner Selection ?

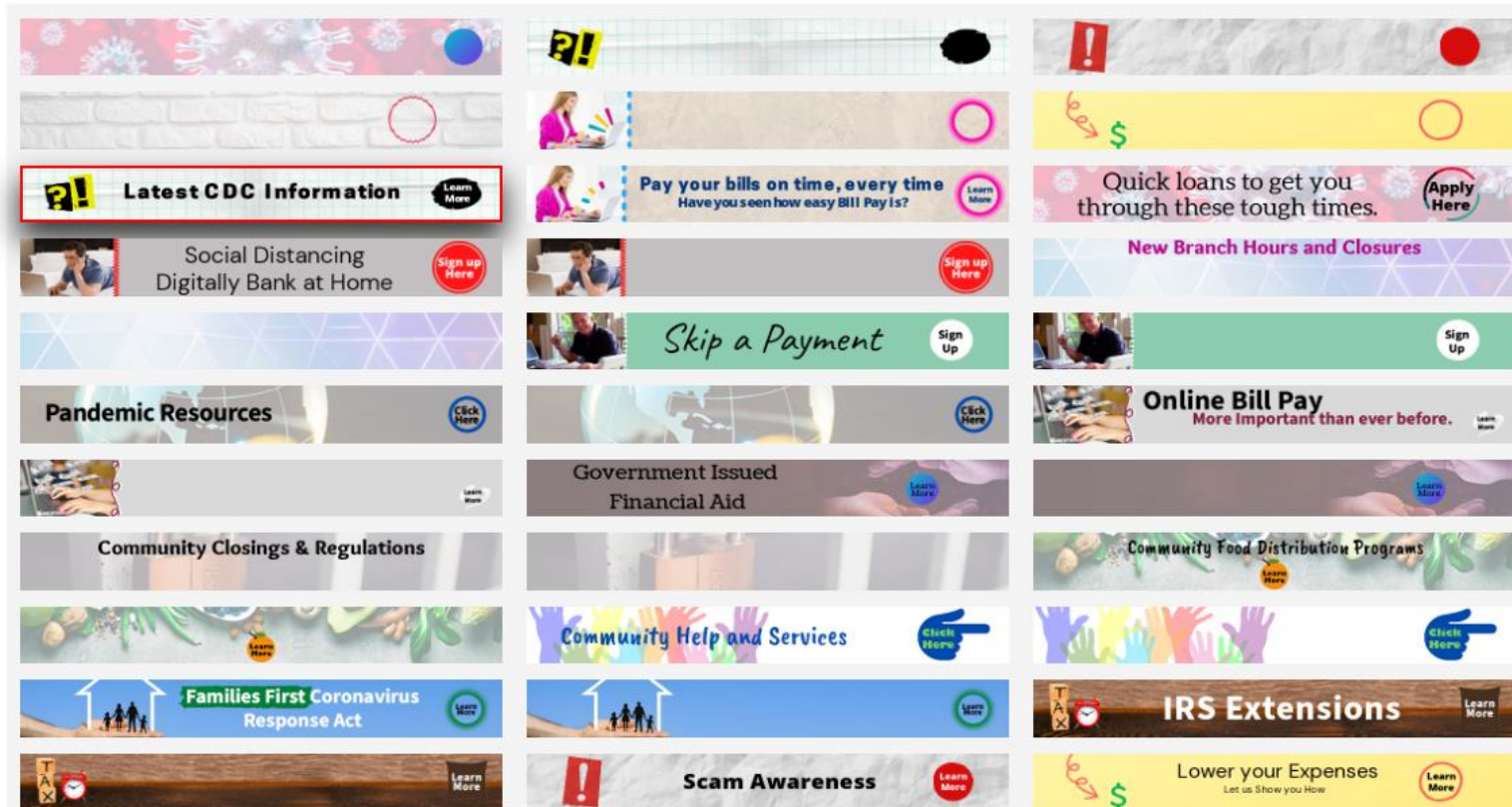
Campaign:

Banner Type

All

Banner Category






[All](#)
[401k](#)
[Auto](#)
[Bill Pay](#)
[Checking](#)
[Colors](#)
[Consumer Loans](#)
[Credit Card](#)
[Critical Outreach](#)
[Direct Deposit](#)
[Holidays](#)



[Next](#)

[Cancel](#)



-  Home
-  Campaigns ▾
-  Reports ▾
-  Settings ▾
-  Support ▾

Banner Editor

Campaign: [DT Test Outreach](#)

Background Settings



Click Settings

☐ No action on click☒ Go to URL [Test URL](#)☒ Open in new window☐ Speedbump[Save](#)[Exit](#)



Coronavirus (COVID-19)

How to protect yourself >

What to do if you are sick >

SYMPTOMS

Watch for fever, coughing and shortness of breath






[Learn more](#) >>

[Slow the spread](#) >


[Prevent getting sick](#) >

[Frequently asked questions](#) >



-  Home
-  Campaigns ▾
-  Reports ▾
-  Settings ▾
-  Support ▾

OLB **Mobile** Email Web eDocument

Campaign: DT Test Outreach 

Create New Banner



Create New Banner

Campaign: DT Test Outreach

Select Size (Device Independent Pixels)

- ☒ 320x50
- ☐ 360x55
- ☐ 375x60
- ☐ 468x60
- ☐ 728x90
- ☐ Custom

Width

320

Height

50

Select Density

2X (Recommended) ▾

Type of Banner

- ☐ Upload HTML
- ☒ Choose from Library
- ☐ Upload your Design
- ☐ Blank Canvas

Helpful Information

For online banking, your default banner size is pre-selected. For mobile banners, we recommend always creating a 320x50 banner as it will fit on all devices.

Note that you are restricted from creating two banners of the same size in the same channel.

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If you want to use a banner from our Banner Library, select "Choose from Library".

If you have an HTML banner or want to create an interstitial banner, select "Upload HTML".

If you want to create your banner entirely within the application, select "Blank Canvas".

[Next](#)[Cancel](#)

Library Banner Selection ?

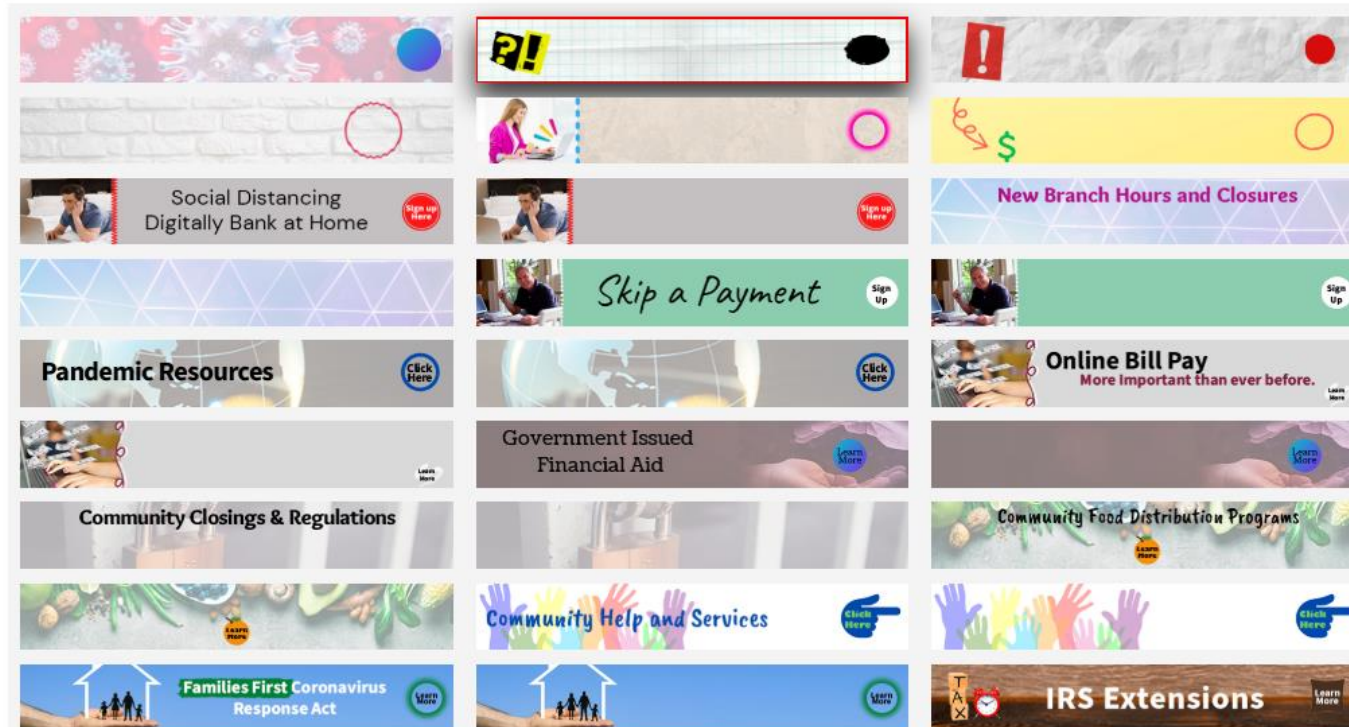
Campaign: [DT Test Outreach](#)

Banner Type

All ▾

Banner Category

All
Auto
Consumer Loans
Credit Card
Critical Outreach
Holidays
Home
Investments
Miscellaneous
Money
Other Vehicles ▾



[Next](#) [Cancel](#)



Banner Editor ?

Campaign: DT Test Outreach

Background Settings

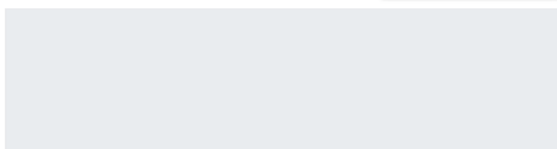


Image Settings



Left	Top	Width	Height

Image Preview



Text Settings



Left	Top	Width	Height
550	29	66	43

Text Preview

Learn
More

☐ Prepend First Name [Preview First Name](#)

☒ Capitalize First Character








Click Settings

- ☐ No action on click
- ☒ Go to URL <https://www.cdc.gov/coronavirus/2019-nco> [Test URL](#)
- ☒ Speedbump

[Save](#)

[Exit](#)



-  Home
-  Campaigns ▾
-  Reports ▾
-  Settings ▾
-  Support ▾

Campaign Settings [Product Assignments](#)

Campaign: DT Test Outreach 

Campaign Name

DT Test Outreach

Campaign Category

Other ▾

Campaign Rule

Shows to all users

Reaches: 0

Campaign Description (ADA Text Field)

Click here for more information on the [Coronavirus](#) at the CDC Website.

☒ Collect metrics on this campaign

Campaign Dates

Start Date ☒ Start showing as soon as it is publishedEnd Date ☐ Never stop showing this campaign

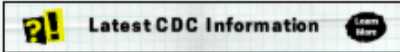
05/31/2020 03:18 pm

☒ Publish Campaign Annually?[Save](#)[Reset](#)

One Campaign Extended Across the Member Journey

OLB Mobile Email Web eDocument

Create New Banner



728 X 90

OLB **Mobile** Email Web eDocument

Create New Banner



320X50

And more channels ...



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1.Design Once, Engage Everywhere

2.Targeted and Personalized Offers

3.Multiple Channels

4.Highly Secure

5.Open, Enabling API

6.Comprehensive Campaign Mgt

7.Track everything with Real-time Metrics

8. Multi-source data aggregation for better targeting

9. Easy integration into new channels

10. Machine Learning for Predictive Rules-based Campaigns

11.~ 95% Automated

12.Already integrated in many apps



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F H K T D V Z M

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