

INNOVATION CONFERENCE 2017



USING PROMOTION SUITE TO MARKET YOUR DIGITAL INSIGHT PRODUCTS

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Objectives

Today we will look at ways to use Promotion Suite to market and cross-sell your Digital Insight products to your current Online Banking users.

During today's session, you will learn...

the
navigation
and
features of
Promotion
Suite

the steps
for
creating a
new
campaign

reports
that are
available
and how
to use
them

basic
features of
the Pulsate
product –
coming
soon!

Campaign States



Active Campaigns

Active Campaigns – shows the current campaigns running today.



Scheduled Campaigns

Scheduled Campaigns – Future dated campaigns.



Draft Campaigns

Draft Campaigns – Saved campaigns that you can complete later.



Past Campaigns

Past Campaigns – Campaigns that have completed their End date.

Data-Driven Campaigns

Online Banking site information across ALL of Digital Insight, not just your financial institution.

Information such as...

- Login information
- Payment and payee data
- Products the consumer is using
- Disclosure acceptance
- SMS/Text message Banking information
- Marketing* campaigns
- Campaigns a consumer sees and clicks on

*
This data will become even more valuable as data gathers from more and more financial institutions using Promotion Suite.

Custom Campaigns

Online Banking site
information for your
financial institution ONLY.

Information such as...

- variables for criteria
- data driven choices
- a list of member/customer IDs from a 3rd party platform or from reports

Planning Your Campaigns

What Products Will You Market?

- Create or obtain a list of ALL of your retail banking products:
- Money Management, CDs, money market accounts, online statements, mortgages, home equity loans, etc...
- Choose your Top 5 products to market

Who Is Your Audience?

- What kind of consumer is most likely to buy or use each product?
- Define your target segment, based on the criteria available.

What Will Be The Content?

- Banner ad? Text only?
- Other attributes, like how long it will run, or how many times a consumer will see it.

Bill Pay Campaign Sample

Bill Pay Promotion

Segment: Users not registered for bill pay

Content: Clickable banner ad that directs to the bill pay page in Online Banking.



Tablet Banking Campaign Sample



Consumer
Mobile Apps
Promotion

Segment: Users who
have not used the
iPhone or Android
app

Content: Clickable
banner ad that
directs to the page
on your website
where they find the
QR code to the app
stores

Car Loan Campaign Sample

Car Loan Promotion

Segment: Users who have used Bill Pay in the last 30 days and have any mobile activity.

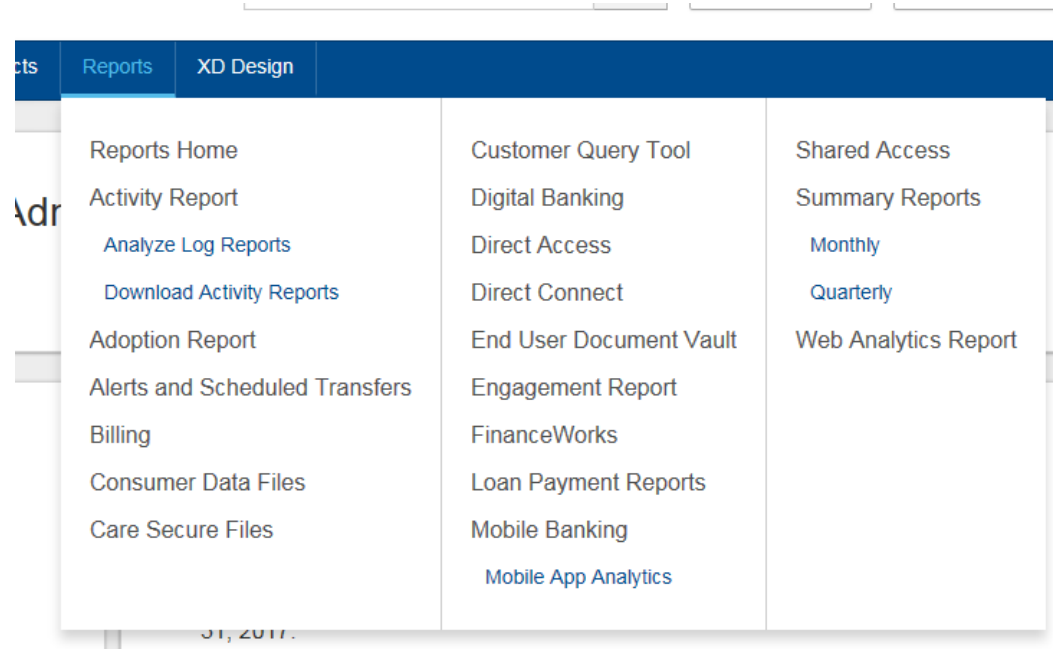
Content: Marketing text "Check out our new car loan rates today!"



**Let's Walk
Through
a Campaign!**

Reporting Options

How can reports help me?



ANY Excel CSV file of Customer/Member IDs can be uploaded and targeted for a promotion!

Report Examples

Activity Reports

user activity based on
Online Banking and Mobile
Banking.

Activity Examples: RDC
Deposit, Money Export,
Spanish Login

Consumer Data Files

Raw data of users

Activity Example: Product
Registration for
applications including
Android, Android Tablet,
iPhone, iPad, Money
Management and Online
Statements

Page 13

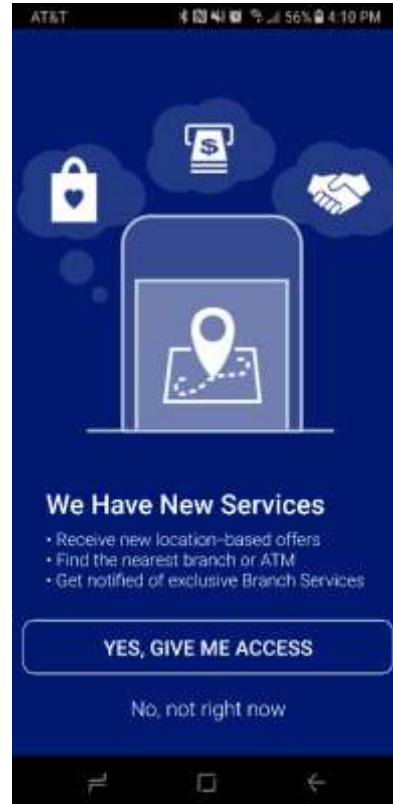
Digital Banking Reports

User level information for
various mobile and online
applications

Activity Example: Target
users with more than two
accounts

Coming soon!

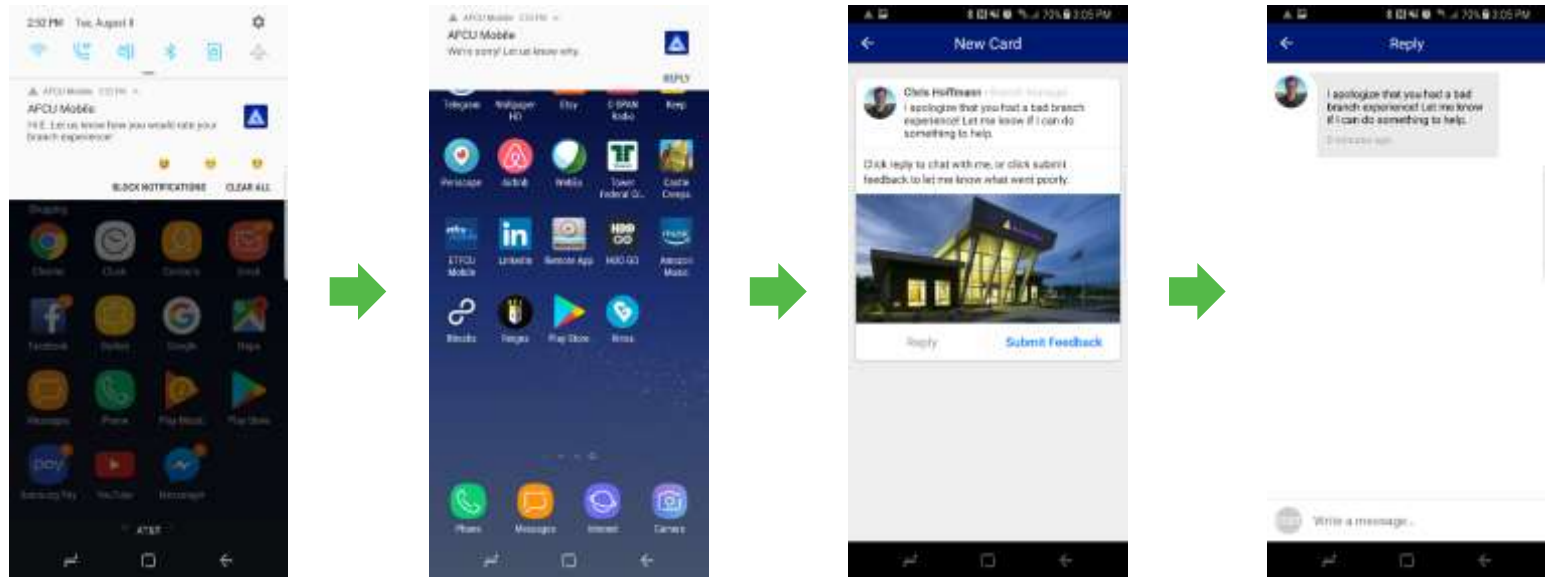
Coming soon – Pulsate!



Personal Push Notification Promotion Example

The end user visited the branch and they are presented with a branch exit survey. If the user clicks on the sad emoji they would see a pop up in mobile and/or receive a text message.

The final campaign should look similar to the following:



Pop Up Mobile Banking Promotion Example

Push out an in app notification that a credit card has been compromised.

The final campaign should look similar to the following:

Example 1



Example 2



Course and QHG URLs

Promotion Suite Course

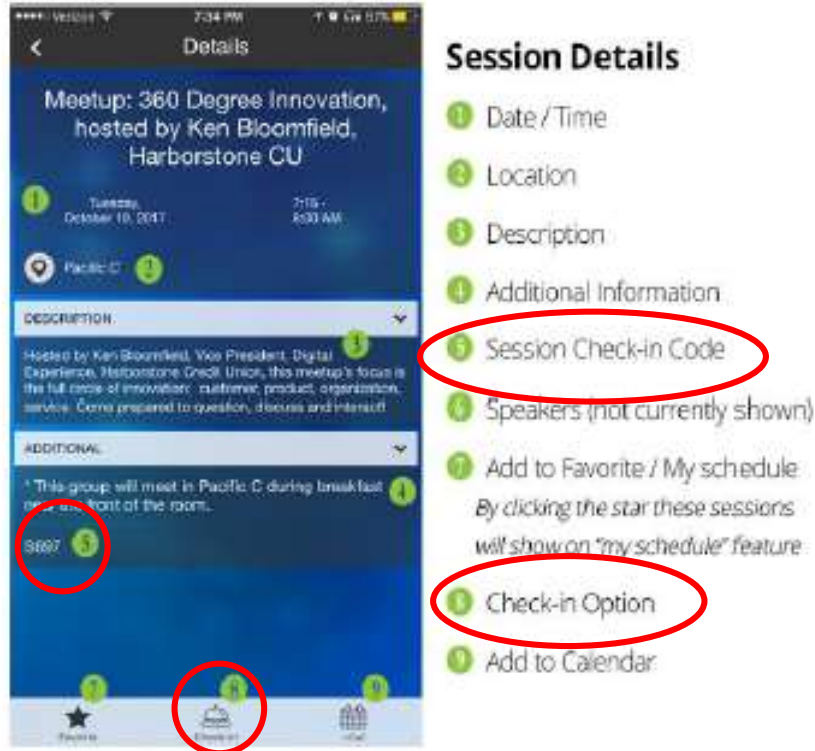
http://training.digitalinsight.com/diu/added/promo_suite/story.html

Quick Help Guides

<http://training.digitalinsight.com/diu/added/promosuite-qhg.zip>

Please give us your feedback!

Session Detail Screenshot



You can earn 10 points toward the Innovation Game right now!

Please go to “Schedule” in the mobile app, find this session, and take a short survey to provide feedback.

Surveys will remain open for 2 hours.

Survey code is **S732**

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THANK YOU

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