

Geezeo[®]

Enriching Digital Banking

Marketing Strategy to Promote Your PFM

A Case Study Example: Liberty Bank



When Liberty Bank prepared to launch its new Geezeo digital financial management platform, here are some of the

marketing strategy

best practices

they put in place, that we'd recommend for any client.

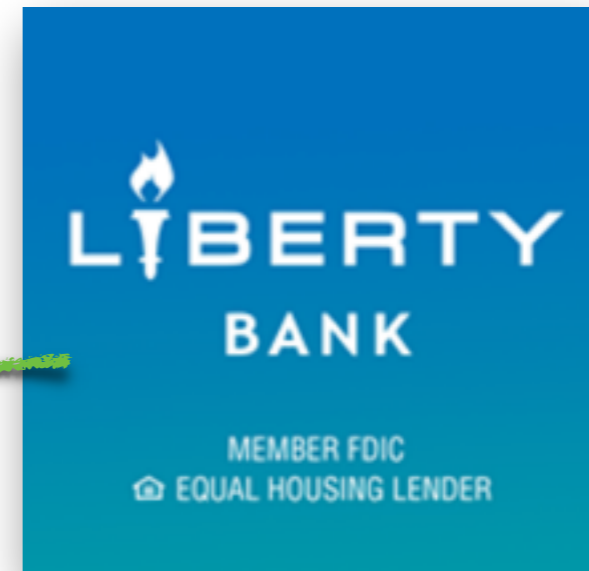


WHO

\$4 billion in assets;
190,000 customers.

Chartered in 1825;
Oldest mutual bank in CT

Branding



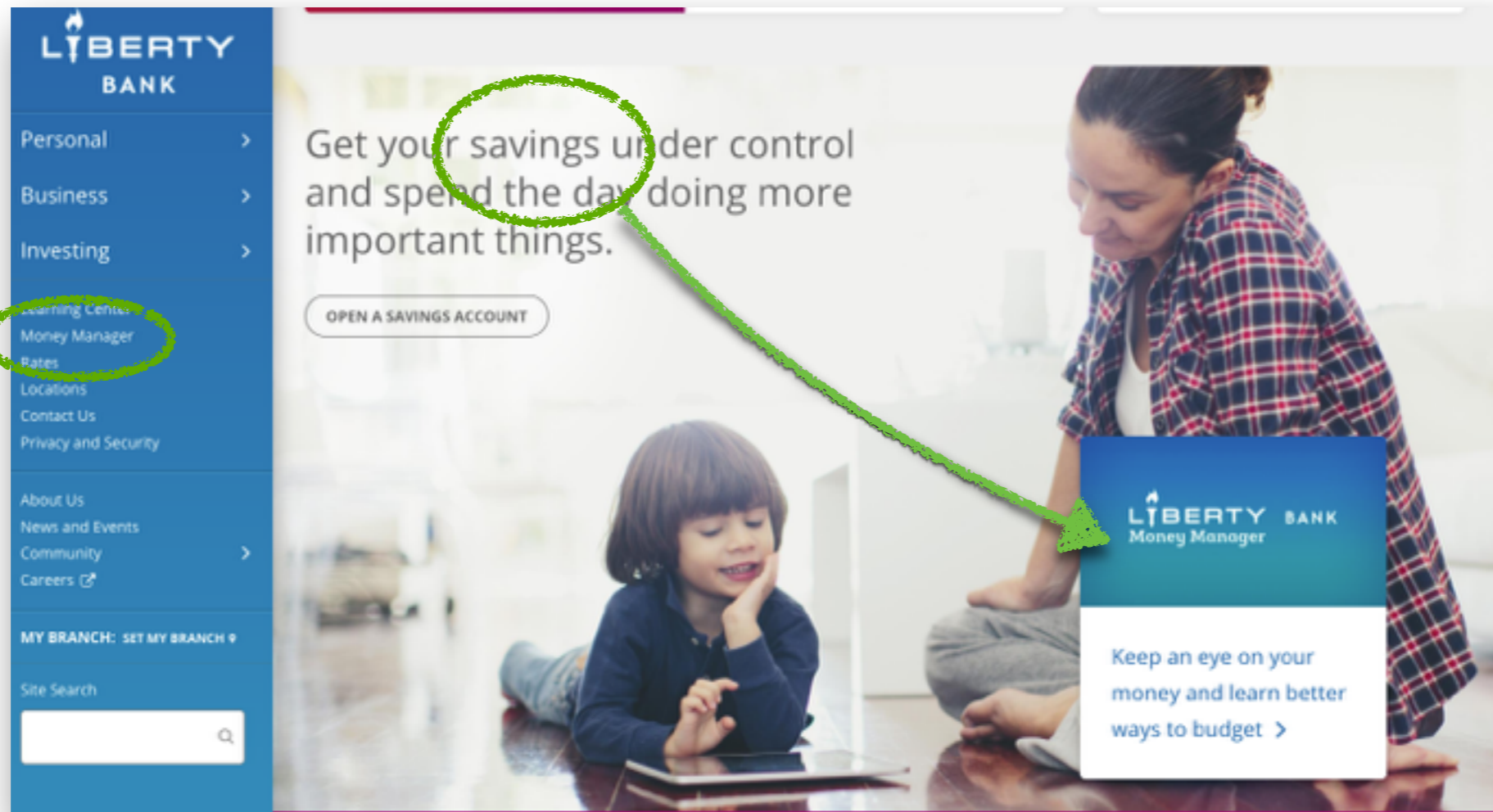
closely tied to FI brand



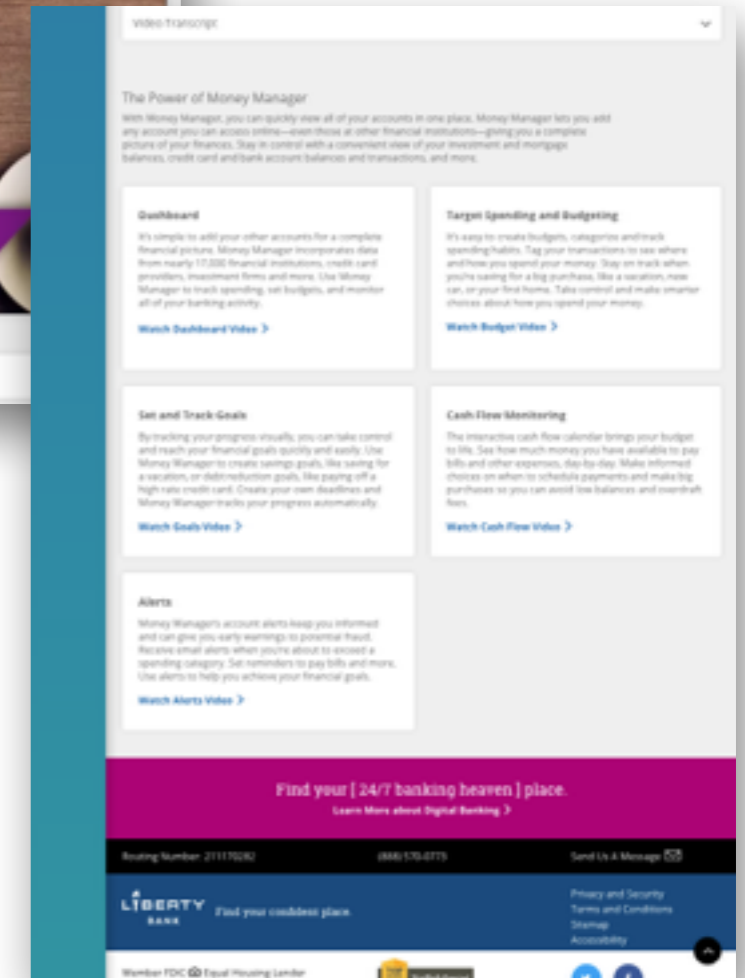
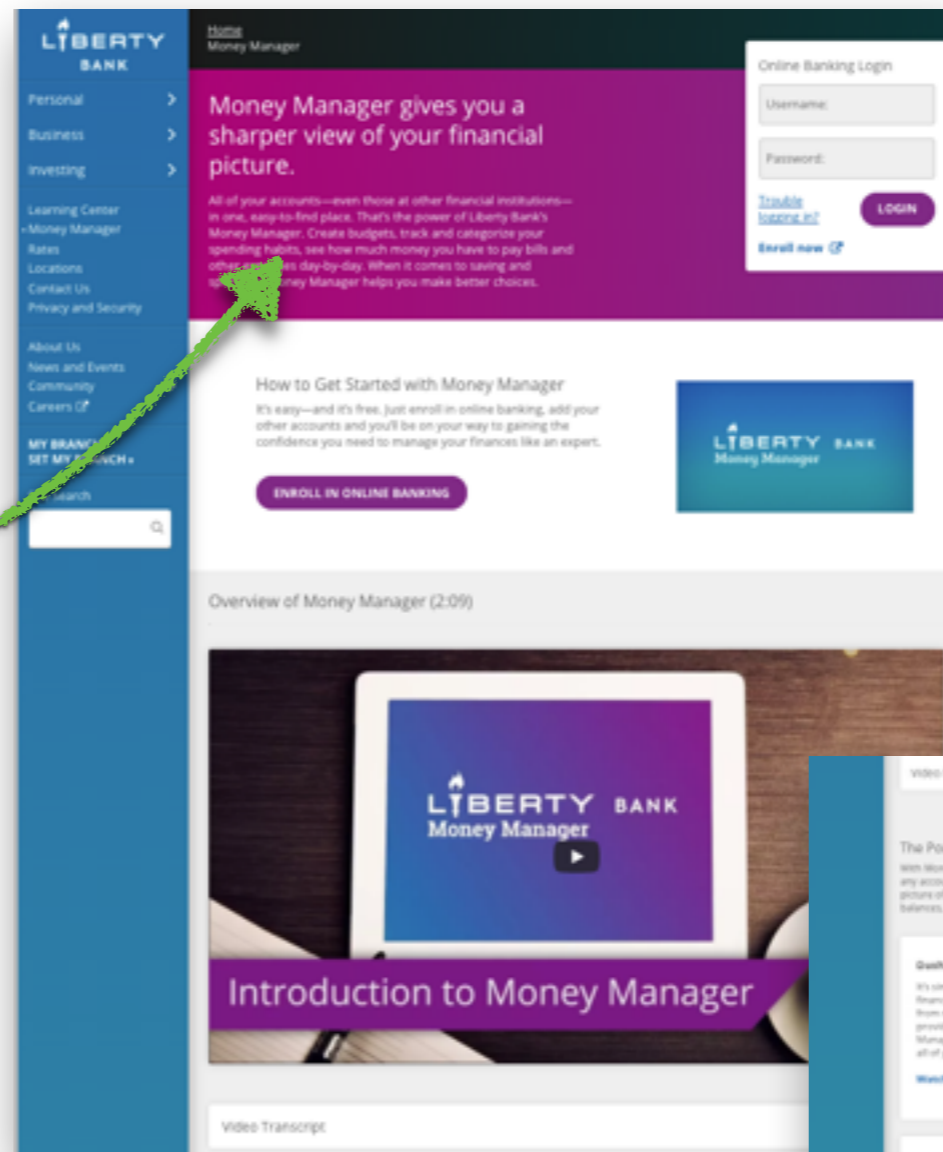
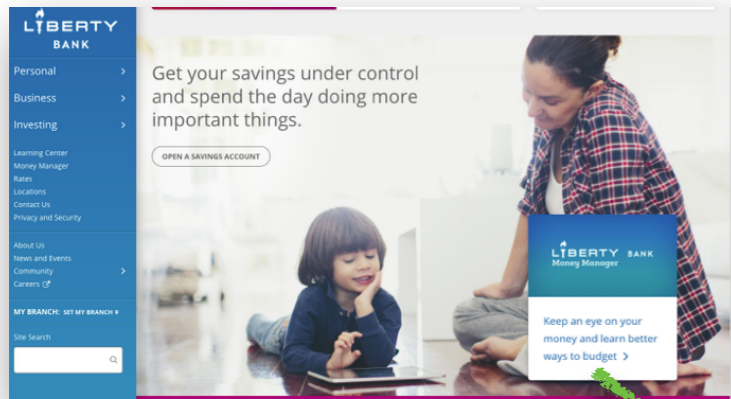
Website home page

Tying in messaging with
other accounts

In main
NAV



home page

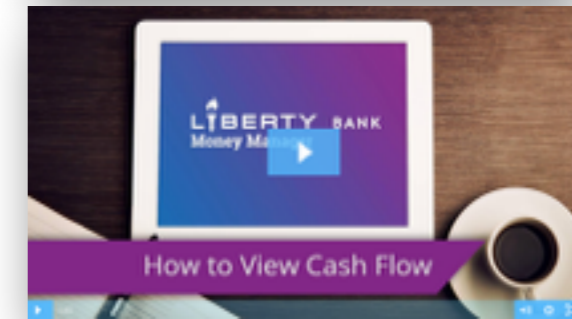
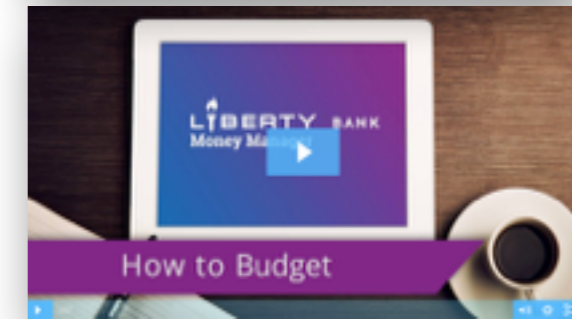


Setting up a landing page

an educational hub for customers and staff using Geezeo-provided product & benefits text & custom video



Educating with video



LIBERTY BANK Money Manager

Dashboard Budget Cashflow Goals Net Worth Alerts Logout HELP

ADD UPDATE

Show more information

CASH	\$8,985.99
Checking	\$4,785.99
Savings	\$4,200.00
CREDIT CARDS	\$6,784.98
Visa Platinum	\$6,784.98
DEBTS	\$21,982.78
Auto Loan	\$21,982.78
INVESTMENTS	\$17,074.85
401(k)	\$17,074.85

Advanced SEARCH

Monday, September 25, 2017 EXPORT TRANSACTIONS

Starbucks	Diningout	-\$6.83
Check #125	Personal	-\$200.00
Vonage	Utilities	-\$10.95
GameStop	Entertainment	-\$5.99
Drive's Auto Service	Utilities	-\$17.17

Total Budget \$1,205/\$1,650

Transportation	\$287/\$250
Utilities	\$276/\$300
Entertainment	\$157/\$200
Groceries	\$347/\$500
Diningout	\$138/\$400

GO TO BUDGET

View all of your investment, loan, credit card and bank accounts from any institution in one place



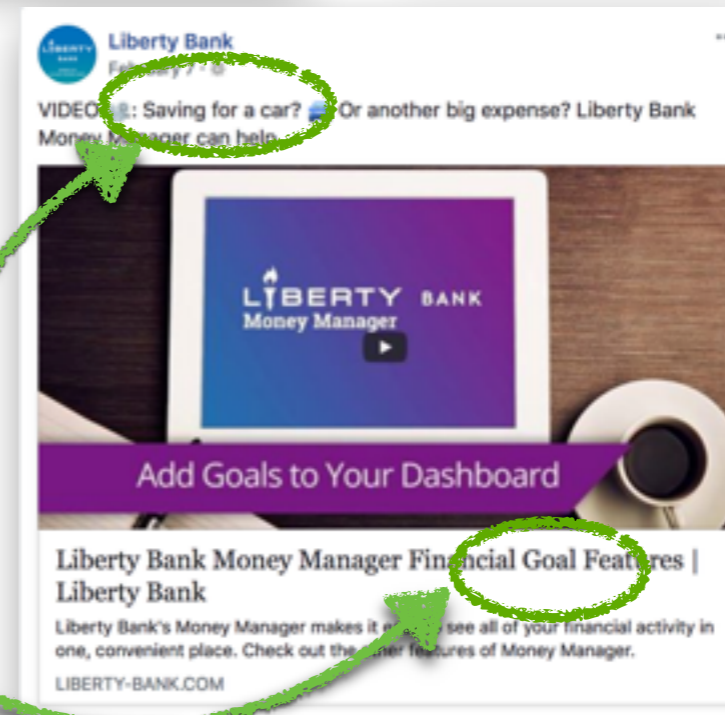
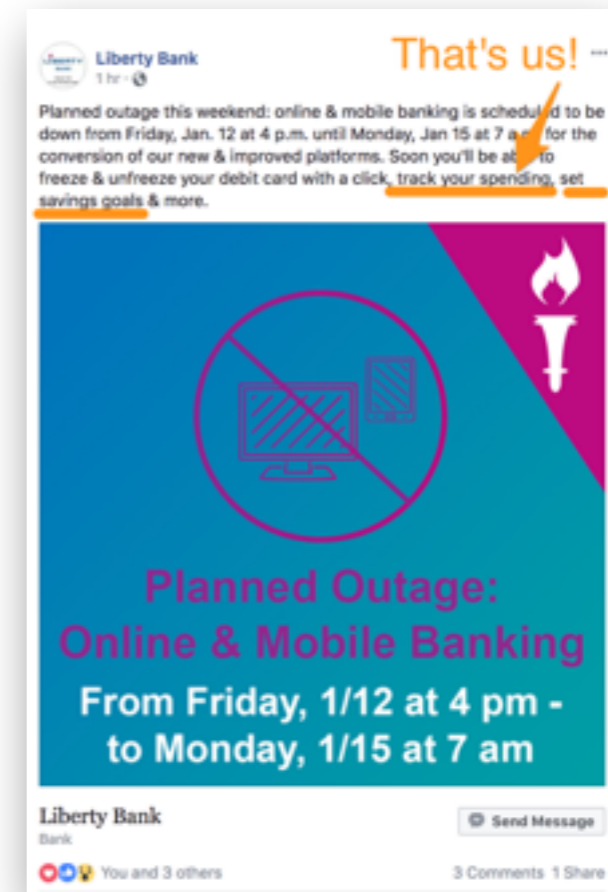
Highlighting tiles integration in online banking

The image displays a screenshot of the Liberty Bank online banking interface. The interface is divided into several sections:

- CONTACT US:** We're here to help. 888-570-0773. Monday-Friday 8 a.m. - 7 p.m. Saturday 8 a.m. - 3 p.m.
- MONEY MANAGER:** A calendar view showing dates from 26 to 6.
- ACCOUNTS SUMMARY:** Includes navigation buttons for Accounts Summary, Account Activity, eStatements, and Guard Your Card. It features a donut chart for "Savings \$104" with tabs for 1 week, 1 month, 3 months, and 6 months. A green arrow points to the "1 month" tab.
- DEPOSITS:** A table with columns for Account Nickname and Account Name, listing "PayBack Checking".
- LOANS:** A table with columns for Account Nickname and Account Name, listing "Consumer Home Improvement".
- QUICK LINKS:** Includes eStatements and Pay Bills.
- CALCULATOR:** Shows a value of 0:15.

In the bottom left corner, there is a video thumbnail titled "Introduction to Liberty Online Banking" showing a tablet with the Liberty Bank logo and a play button. A green arrow also points from the top right of the main screenshot towards the "1 month" tab in the donut chart.

Creating a social strategy



promoting benefits & features

Using product images

The Power of Money Manager:
With Money Manager you have the power to take charge of your finances by seeing all your accounts—even those at other financial institutions—all in one spot, from any device, anywhere. Track your spending, plan for big purchases, stay ahead of fraudulent activity, monitor your daily cash flow, and so much more.

Widget master+
Various widgets are embedded into Money Manager. A calculator, budgeting, and goal tracking tools are just a few of the thingamajigs that help you take control and make smarter money choices.

Get a sharper view of your financial picture.

- View accounts, transaction feeds and customizable widgets.
- Create budgets and see how much money you have to pay bills and other necessities, day-by-day.
- Set customized tags and categories for purchases like entertainment, dining out, utilities and personal care.
- Filter transactions based on amount, date and tags - a useful feature for preparing an expense and donation report during tax time and for detecting fraud.

Stay alert!
Alerts are sent via text or email and are available on the main Dashboard. Choose to set up alerts - an easy way to monitor monthly spending limits, get suspected fraud notifications, check progress toward goals and track spending. Receive alerts when you're about to exceed a spending category, set reminders to pay bills and more!

Flow in...and flow out
The interactive cash flow calendar brings your budget to life. Add your income and bills to get monthly, weekly and even daily views of your liquid cash. Make informed choices on when to schedule payments and avoid low balances and overdraft fees when making big purchases.

Goals, goals, goals
It's all about meeting financial goals, right? Although this isn't always an easy feat, Money Manager allows you to keep a close eye your financial goals quickly and easily. Create savings goals, like saving for a vacation, or debt reduction goals, like paying off a high-rate credit card. Set your own deadlines and your progress is automatically monitored.

Eye. On. The. Target.
Budgets allow you to create spending targets to track variable expenses and are automatically color-coded based on growth. See monthly reports, running from the first to the last day each month. Tag your transactions to see where and how your money is spent. Stay on track when you're saving for a big purchase, like a new car or your dream home.

What's your worth?
Monitor current assets and debts through Money Manager. Net worth calculates daily behind the scenes based on the accounts you've added, your expenses and so on.

Follow the road to financial bliss: Start with Money Manager right away!
Financial expert, who needs that? It's easy—and free with Money Manager. You just have to be enrolled in Online Banking first. When logged in, add other accounts and you'll be on your way to gaining the confidence you need to manage your finances like a true expert. Learn more and watch the Money Manager video tutorials 24/7: liberty-bank.com/money-manager

How can we help?
Ready for great product solutions you just can't pass up and friendly service that won't let you down? Give us a call at (888) 570-0773, visit us at www.liberty-bank.com, or stop by any branch. We'll be glad to match your needs to the solution that works best for you.

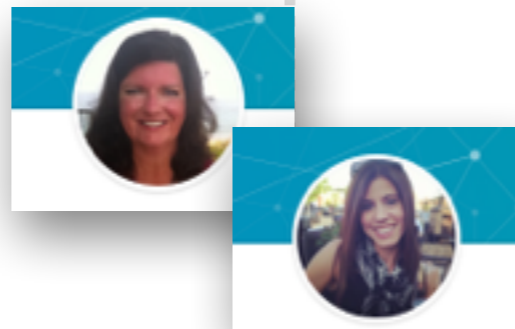
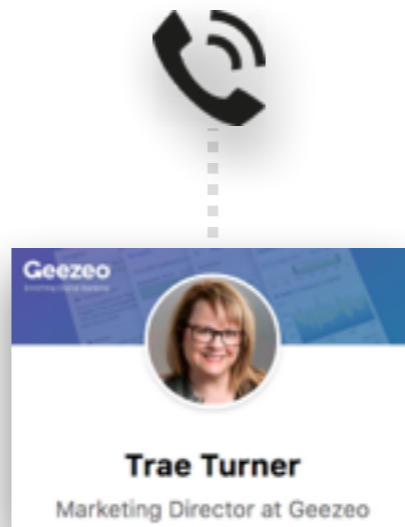
LIBERTY BANK
Find your confident place.
MEMBER FDIC EQUAL HOUSING LENDER

Find your [control is at my fingertips] place.
Money Manager

Geezeo provided high resolution product screenshots & text for Liberty's brochure design



Working with



Trae Turner, Geezeo Marketing Director, worked together on weekly calls with **Liberty** marketing to ensure a consistent launch strategy.

We also worked with Liberty's advertising agency, **Cronin**, to give guidance and provide content for product messaging in Liberty's website strategy.

“Best of all, Geezeo’s team was a joy to work with.

...

Bear in mind, Money Manager is one piece of a larger digital initiative including a brand new website redesign;

...

What’s more, after helping us with Money Manager, Geezeo helped to create a library of Liberty Online Banking educational videos for customers, which will also live on our new website. And through it all, Geezeo’s staff has been very patient and helpful, even when given tight deadlines.”

— Liberty Bank Chief Marketing Officer
Patricia Jatkevicius



Adoption Marketing

- social
- emails
- lobby monitor
- website ads
- landing page
- video
- Geezeo's quarterly turn-key campaigns

**promote
your PFM**



**give them
what they
need**



- Targeted, personalized outreach
- better loan rates
 - vehicle loans
 - HELOC
 - wealth management
 - credit cards
 - fraud alerts

*Adoption
Marketing
&
PFM Data*

In PFM,

- synced accounts from other FIs
- tagged transactions
- net worth assets and debts
- budget categories
- short and long-term savings goals

**customers
tell you
who they are**

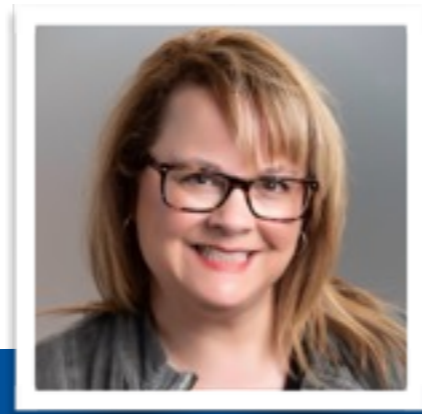


**listen
to them**



- View in PFM Admin
- accounts, loans, credit cards, mortgages at other FIs
 - savings goals
 - cash flow issues





To learn more, do not hesitate to contact:

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