

Leveraging PFM to Deepen Relationships & Build Engagement

The Geezeo Platform enables your Financial Institution to better know your customer, deepen your relationships through engagement, and proactively offer the right products to these customers across your retail delivery platforms. Using the instructions below, you'll be able to segment your customer base, using PFM data, and create relevant and contextual marketing messages to best serve your customers.

Market Segment:

Customers who do not have a specific long-term financial goal

- 1 Log into your Geezeo Admin site
Contact your Client Success Manager or support@geezeo.com if you have questions on accessing the Admin Platform.
- 2 Navigate to "Run a Report" and select "Marketing Campaign Report"
- 3 Select from following criteria:

Target your Users

Find users with **all** of the following conditions

- ✓ Please select a condition
- User Conditions
- User City
- User Net Worth
- User State
- User Zip
- Account Conditions
- Account Balance
- Account Institution Name
- Account Location
- Account Type
- Savings Goal Conditions
- Savings Goal Type**
- Payoff Goal Conditions
- Payoff Goal Type

- 4 Indicate the specific long-term savings goal(s) you want to target
Long term savings goals include: Save for Retirement and Save for College

Find users with **all** of the following conditions

Savings Goal Type Does not have Save for retirement Remove Filter

Add a Subfilter

Add a condition

- 5 Click "Run this Report"
- 6 Create a Marketing Campaign
Geezeo Admin reports allow you to create a campaign within the PFM product or to download the report and leverage the information elsewhere such as within an email marketing campaign.

FOR MORE INFORMATION ON HOW YOU CAN LEVERAGE THIS DATA, OR OTHER DATA POINTS AVAILABLE IN THE GEEZEO PLATFORM, CONTACT YOUR CLIENT SUCCESS MANAGER, TODAY!

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Engagement Banking

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