

**See it in action**

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## PERSONAL BANKING - PLATFORM USE CASES

Financial institutions use the Digital Onboarding engagement platform to turn account openers into engaged and profitable relationships. Below is a list of the most popular personal (consumer) banking use cases.

### Acquisition

Grow your base. Win back abandoned applicants, and make it easy for people to refer friends & family.

- Abandoned application win back
- Refer-a-Friend
- Select Employer Group - educational acquisition
- In-Person event
- Email & text message consent capture

### Activation

Make it easy for people to enroll in and use account-related services:

- Direct deposit
- Online banking
- Mobile banking & other apps
- eStatements
- Default payment methods
- P2P payments
- Automatic loan payments
- Extended overdraft protection
- Rewards programs

### Cross-Sell

Use the platform and credit bureau data to deliver personalized cross-sell offers.

- Checking accounts
- Credit cards
- Personal loans
- Mortgages
- HELOCs
- Auto & recreational vehicle loans
- Auto & recreational vehicle loan refis
- Savings accounts
- CDs

### Education

Help people fully utilize the accounts they opened and live financially stable lives by educating them on how to:

- Adopt account-related services
- Securely access account & member numbers
- Create savings goals
- Get & manage credit scores
- Choose the right mortgage

### Appreciation

Show customers and members how much you appreciate them with:

- Birthday greetings
- Holiday greetings
- Anniversary greetings
- Contests & recognition

### Transition Management

Communicate with people before, during, and after an M&A or digital banking system conversion event.

- Mergers & acquisitions
- System conversions

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## SMALL BUSINESS BANKING - PLATFORM USE CASES

Financial institutions use the Digital Onboarding engagement platform to turn account openers into engaged and profitable relationships. Below is a list of the most popular small business banking use cases.

### Acquisition

Grow your base. Win back abandoned applicants, and make it easy for people to refer friends & family.

- Abandoned application win back
- Select Employer Group - acquisition-branded for employers
- Industry-specific lending acquisition (e.g., dental practice loans)

### Activation

Turn account openers into engaged and profitable relationships. Make it easy for businesses to enroll in and use account-related services:

- Online banking
- Mobile banking & other apps
- eStatements
- Default payment methods
- Automatic loan payments
- Extended overdraft protection

### Cross-Sell

Use the platform to deliver personalized cross-sell offers.

- Checking accounts
- Savings accounts
- Health savings accounts
- Credit cards
- Business lines of credit
- Commercial loans
- Merchant services
- Tax services
- Courier services
- Wires
- Notary services
- Safe deposit boxes
- Insurance services

### Education

Help businesses fully utilize the accounts they opened and live financially stable lives by educating them on how to:

- Adopt account-related services
- Securely access account & member numbers
- Apply for PPP loan forgiveness

### Appreciation

Show businesses how much you appreciate them with:

- Birthday greetings
- Holiday greetings
- Anniversary greetings
- Contests & recognition

### Transition Management

Communicate with businesses before, during, and after an M&A or digital banking system conversion event.

- Mergers & acquisitions
- System conversions