



# Make surveys actionable

Discover additional needs & automatically deliver relevant offers

## THE OPPORTUNITY

Banks and credit unions want to deliver education and offers that people value, but it can take a lot of work to determine what each customer and member needs - and when they need it. As a result, institutions take a "spray and pray" approach to cross-selling. The offers are only sometimes relevant, which leads to lower campaign performance.

## THE SOLUTION

You may use advanced analytics to identify opportunities or a basic approach. Regardless, asking is often the best way to discover what someone needs. Now you can create surveys that uncover hidden needs for education, services, and additional banking products. You can automatically trigger personalized campaigns with offers and information that customers and members value.



### Create unlimited surveys

Find out what people and businesses need. Choose from multiple-choice, list, and open-ended answer formats.



### Visualize the results

See survey answers in colorful graphics, and easily create audience segments for follow-up communications.



### Notify your staff

Trigger email messages to alert personal bankers and other team members about customer needs.



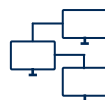
### Deliver personalized offers

Use survey data to automatically retarget people and businesses. Deliver education and personalized offers they value.



### Get more responses

Automatically retarget customers who haven't completed the survey within a defined period.



### Update your systems

Use webhooks to update your database and other systems with the survey data. Give frontline staff the visibility they need.

## GET STARTED

Contact your Account Manager or email [sales@digitalonboarding.com](mailto:sales@digitalonboarding.com) to learn more.



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