

Naehas Offer Management Solution Drives Relationships and Revenue

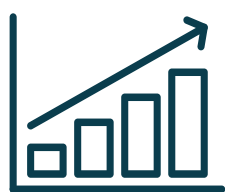
In a highly-regulated and complex industry, meeting the requirements inherent of delivering personalized products, pricing and experiences is daunting, but doable. As shown here, implementing the Naehas offer management solution and automating the offer lifecycle from strategy to fulfillment, enables financial institutions to meet their primary goals of expanding relationships and driving revenue.

The client is one of the world's largest financial institutions. Serving more than 50 million U.S. consumer and small business relationships, the company offers a full range of banking, investing, asset management and risk management products and services. They partnered with Naehas to deliver more personalized offers and experiences to their customers across all their channels.

The Challenge

The Offer Management process was not scaling to meet the increased need for personalization and speed

The Naehas team applied their experience in the financial industry to assess the client's pain points



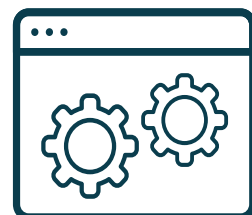
Increasing volume of personalized offers required added costs/FTE



Increasing lead times and associated costs due to manual changes



Limited access control, auditing and quality control capabilities led to error-prone output, and increased risk



Old monolithic systems requiring specialized resources for configuration

"MarTech capabilities enabled nearly 60% of the process to be automated; as a result we have gained 3,000 hours in resource efficiency."

- MarTech leader from Top 10 Bank

The Solution

Optimizing Offer Management with Naehas

The client team members, from marketing strategy and execution and data management and compliance, worked with Naehas to employ a full-range offer management platform solution.

How the Platform Answered the Needs

- ✓ Centralized systems of record for all offers and strategies using a powerful data model that covers all offer types
- ✓ Automated the creation of disclosures and content for presentation within all channels
- ✓ Business configurable solution allowed stakeholders to rapidly address any changing business needs
- ✓ Workflow engine allowed stakeholders to collaborate and move offers from conception to market with minimal risk
- ✓ Integrations with system of record for account information and channels for presenting the offers to the consumers

Business Impact

Measuring Success: Results and ROI

The Naehas offer management program generated results which exceeded expectations, with objectives focused on value, speed, reduced risk and innovation.

Value



- **Increased personalization by 3x**
- **Increased volume 145%** while keeping the same team

Speed



- **Improved the SLA** to create, manage, test, and deploy offers by **60-70%** while increasing the volume of offers by **15%**
- **Reduced approval time** by more than **75%**

Reduced Risk



- **Reduced the number of errors by 25%** while **reducing the time spent on quality control** by more than **80%**

Innovation



- Replaced system with **business-configurable platform** that **reduced IT costs by \$600K** per year and **operational costs by \$750K**

About Naehas

Naehas is a customer experience cloud that enables financial services companies to flawlessly deliver personalized products, pricing and experiences. Our Offer Management solution automates the creation and delivery of personalized offers and relationship pricing for all financial services products and services. The Naehas platform manages the complete offer lifecycle from strategy to fulfillment, including tracking of when customers have met the offer requirements.

To learn more, or request a demo, contact our team:

www.naehas.com/contact-us