

# Offer Management Solution

Powering personalized offers & relationship packages to drive revenue and increase customer retention.

Naehas Offer Management Solution is a comprehensive platform that connects and centralizes the entire offer lifecycle — from strategy to fulfillment.

Many financial services companies struggle to maintain a competitive advantage because of their inability to deliver personalized offers that are based on complex product and relationship pricing strategies. The process to target and personalize offers is also tedious, time-consuming and error-prone resulting in longer cycle times and delays in bringing new offers to market.

Naehas Offer Management solution is purpose-built for financial services companies so they can easily create, manage and track all their offers from one centralized platform, greatly increasing the scale and effectiveness of their marketing programs. Automated quality control & auditing tools ensure offers meet all compliance and brand requirements.



## Increase Revenue Opportunities

Increase value by delivering personalized offers and relationship packages to customers

**ROI:** 30% improvement in marketing ROI due to increase in conversions



## Enhance Customer Experience

Proactively keep customers informed of their fulfillment status throughout the journey

**Impact:** Highly engaged customers with offer redemption rates above 90%



## Reduce Risk

Automated quality control & auditing tools ensure offers meet compliance and brand requirements

**Result:** Zero compliance errors



## Faster Time-to-Market

Maintain a competitive edge by greatly reducing the time required to bring offers to market

**Outcomes:** 70% reduction in cycle time driving more customers and higher revenue

### Design

- Product and offer strategy
- Offer performance analytics
- Segmentation and ROE
- Strategy approvals



STRATEGY



OPERATIONS

### Fulfill

- Offer fulfillment and reporting
- Customer care resolution
- Customer and service messages



COMPLIANCE

### Present

- Disclosure management
- Channel setup
- Channel validation and delivery

### Build

- Creative brief and design
- Offer and product setup
- List and decisioning setup
- Compliance approvals



CREATIVE & MARKETING OPS

The Offer Management solution enables companies to elevate customer experiences to attract, retain and grow more customers. Naehas works with the top financial services companies to build features that are designed to manage the complexity of offers today and into the future.

## Increase Revenue Opportunities

Increase the scale and effectiveness of personalized offers resulting in higher revenue and faster time to market

- Define, build, deliver and track offers, across multiple lines of business, eliminating complex and time-consuming manual processes
- Quickly determine eligible audiences and prioritize offers based on customer and business value
- Present personalized offers to customers in any channel, including web, email, print or branch

## Enhance Customer Experience

Create a better customer experience with real-time visibility into status of offer fulfillment requirements

- Collaboratively monitor offer responses and take a proactive approach to ensure customers satisfy all stipulations to receive their reward
- Provide customer care teams with visibility into fulfillment status to promptly respond to customer inquiries
- Aggregate reporting and actionable insights to track offers sent to consumers and measure offer reach and performance

## Purpose-built for Financial Services

Proven to meet the risk and scalability requirements of top financial services organizations

- Flexible offer data model that can easily be customized without IT or developer involvement – a true no-code capability
- Out-of-the-box features built specifically for banks – eliminating costly customizations
- Integrations with 3rd party or home-grown banking systems, like origination, transaction & payment systems
- Robust compliance audit trail at a field level for auditability and continuous improvement

Updated Date	Status	Field	Original Value	New Value
Dec 15, 2022, 11:31:50 AM	Approved	Product		CZMUGOF
Dec 15, 2022, 11:30:08 AM	Approved	Reward Amount	400	200
Dec 15, 2022, 11:30:08 AM	Approved	Offer Description	Reactive Retention for existing MRC customers, where close req...	Reactive Retention for existing MRC customers, where close req...
Dec 15, 2022, 11:28:18 AM	Approved	Status	In-Review	Approved
Dec 15, 2022, 11:28:01 AM	In-Review	Status	Draft	In-Review
Dec 13, 2022, 11:23:11 AM	Draft	Status	Approved	Draft
Dec 9, 2022, 3:38:04 PM	Approved	Product		Silver
Dec 6, 2022, 5:13:50 PM	Approved	Status	In-Review	Approved
Dec 6, 2022, 5:09:34 PM	In-Review	Status	Draft	In-Review
Dec 6, 2022, 5:08:54 PM	Draft	Offer Start Date	Sep 30, 2022	Feb 24, 2023