

Mastech InfoTrellis

Banking Personalization Accelerator

Customers are banking on your speed

Consumers opt for a wide variety of financial services. Banking, wealth management, investment, mortgage, and credit card are extremely competitive spaces where customers spend a lot of time and money. To capitalize on the consumers' demands, firms adopt a wide range of strategies, from specializing in a single aspect of financial products to a one-stop-shop for all areas of finance and banking.

Today, customers have an incredibly wide variety of choices to spend, save, and invest their money. Especially with banks, customers frequently ask, "What is really the difference?" The customer experience is the key differentiator. Now the consumers are forcing banks to provide them with relevant recommendations, services, and offers, or they go to competitors who offer the same with a single click. With ever-increasing communication and purchasing channels, consumers demand consistency, relevancy, and speed.

How can Banks



Create an effective customer retention program with superior products with the shortest time to value?



Expand the depth of customer relationships by offering personalized customer experiences?



Analyze the performance of each branch, financial product, employee, and customer's delight?

Based on over a decade of experience in the Banking space, AmberLeaf, a Mastech InfoTrellis company, built the Banking Personalization Accelerator with a set of technology assets that creates a customer experience architecture to deliver personalized offers, enhanced customer service, and increased engagement for our clients' consumers.

Benefits:



CUSTOMER DATA PLATFORM: Easily access the most relevant engagement, behavioral, and profile information of your customers in real-time that integrates engagement data (web, mobile, customer service, teller/loan officer), bank account data, transactions, and the complete customer profile.






BEHAVIOR-BASED PERSONALIZATION: Create personalized messaging driven by life events, significant balance increases, and fee avoidance opportunities to drive primacy, growth, and customer retention with an automated process of detection.



MULTI-CHANNEL COHESION: Market to customers in their preferred or most active channels like online, mobile, and ATM to increase engagement with a personalization engine.

Mastech InfoTrellis manages the project, designs the database, implements the personalization system, and enhances rules and journeys after implementation. Banking Personalization Accelerator takes advantage of cloud computing to bring implementation timelines down to as little as two weeks for Banks to enhance the customer experience immediately.

Let's Get in Touch

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