

Engage Customer Connect Online Appointment Scheduling – Solution Overview

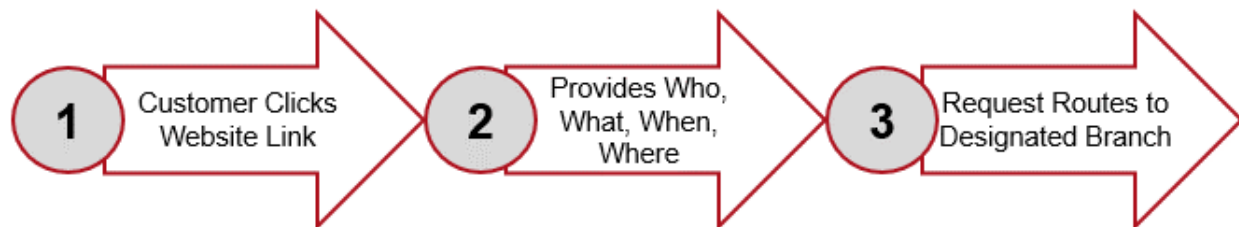
Online Appointment Scheduling (“OAS”) is a SaaS tool which enables your institution to safely manage public access to your branch lobbies and bankers by providing customers and prospects with an easy digital tool to schedule a time to address their needs.

Though once a solution offered primarily by larger financial institutions, pandemic realities and the advent of economical SaaS solutions are bringing this technology to banks and credit unions of all sizes. What’s more, CS3 has expanded the traditional capabilities of an OAS solution to support the growth initiatives of the institution.

Engage Online Appointment Scheduling...

- Provides financial Institutions with a flexible and cost-efficient channel to connect with their customers in good times and bad.
- Mitigates customer concerns by providing a safe, convenient way to connect with your team.
- Adapts to changing consumer behavior with many now viewing OAS as a basic requirement.

Engage is Easy to Use...



Engage Provides Tremendous Value for the Financial Institution...

- The solution is scalable to fit any financial institution.
- Is offered in a SaaS environment and mirrors your website to speed approvals.
- Can be deployed 24-hours after receipt of set up materials (logo & branch contacts).
- Requires no training.
- Is offered at a fraction of the cost of competing solutions.
- Can include turnkey marketing services to fuel growth.
- Includes an on-demand analytics portal, and can monitor customer cross sell activity following the initial appointment (optional). *See page-2 to learn more.*
- Is being further enhanced regularly based on real-time market trends and feedback from institutions just like yours.

Want To See It In Action & Learn More?

Connect with me to arrange a demonstration.

Engage Customer Connect

Monitoring cross sell activity following the appointment.

With the data we receive as part of your Onboarding solution, Engage can monitor the cross sell activity taking place from those who have scheduled an appointment. The solution automatically tracks activity for 30-days following the appointment date.

Here is a high-level summary of results from a few participating financial institutions. Several FI's are reporting that more than **30%** of appointment requests are resulting in the opening of new accounts with significant balance (loan and deposit) gains.

	Appointments Requested	Accounts Opened	Appointment to Account Opening %	Balances Gained	Average Balance
FI 1	341	103	30%	\$10,218,989	\$99,213
FI 2	206	62	30%	\$6,236,682	\$100,592
FI 3	1,928	21	1%	\$2,570,372	\$122,399
FI 4	1,034	218	21%	\$12,943,121	\$59,372
FI 5	1,153	221	19%	\$3,298,835	\$14,927
FI 6	262	33	13%	\$1,067,474	\$32,348
FI 7	445	149	33%	\$1,403,128	\$9,417
Total	5,369	807		\$37,738,601	\$46,764

The solution gives you the ability to go beyond summary data and provide product specific detail as is shown below:

	Cross Sell Detail	Accounts	Balances
SAV	Savings	24	\$146,900
CHK	Checking	101	\$728,226
MMA	Money Market	6	\$346,154
BCK	Business Checking	14	\$154,492
MLN	Mortgage Loan	20	\$7,513,934
PLN	Personal Loan	9	\$406,804
BLN	Business Loan	2	\$291,470
CDD	Certificate of Deposit	41	\$3,355,088
IRA	IRA Account	0	\$0
CRD	Credit Card	0	\$0
SDB	Safe Deposit Box	0	\$0
BSV	Business Savings	1	\$50
INV	Investment	0	\$0
OTH	Other	0	\$0
	Total	218	\$12,943,118