

# **PRISMA CAMPAIGNS**

Competitive Messaging Analysis

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# THE LANDSCAPE

## DIGITAL BANKING

The financial sector is in the midst of major disruption as a variety of macro forces—accelerated digitization, global economic upheaval and increased competition from both emerging startups and Big Tech incumbents—begin to converge. A digital transformation mindset will be critical to navigate this uncertainty while ensuring the needs of the customer always remain front and center. Successful organizations will embrace key technologies, like artificial intelligence, machine learning software and blockchain to deliver more relevant services and generate new revenue streams.

## MARKETING AUTOMATION

Automation and artificial intelligence can turbocharge marketing capabilities, which is why Financial CMOs, CIOs and CTOs are rapidly embracing it. Digital marketing leaders use multichannel marketing hubs like Prisma Campaigns to deliver contextually relevant experiences on complex customer journeys.

**With marketing automation, financial institutions fall into three categories:**

- Those who lack a coherent, functioning marketing automation solution
- Those who have a dormant marketing automation software that they've struggled to leverage
- Those with a collection of tools that have fragmented journeys and automations

## INSIGHTS

**Martech is a \$122 billion industry that's growing by 22% year over year.**

**70% of CMOs are increasing their investments in it.**

**85% of enterprise decision-makers say they have a time frame of two years to make significant inroads into digital transformation or they will fall behind their competitors and suffer financially.**

## **ABOUT THIS REPORT**

The information in this report examines the key themes that define the digital brand experience of Prisma Campaigns and its competitors through the lens of brand personality and brand messaging. It also explores the seismic shifts taking place in the banking and finance industry that Prisma Campaigns can take advantage of to continue winning in this space. Insights were sourced from industry analyst reports, brands' websites and social platforms.

# Competitive Analysis

# COMPETITIVE ANALYSIS



vs.









onovative

INTUVO









MARQUIS



# COMPETITIVE ANALYSIS









	 Prisma CAMPAIGNS	 CO DIGITAL ONBOARDING	 INTUVO	 MARQUIS	 DeepTarget <sup>®</sup> engage cross-sell. measure.	 onovative	 Flybits	 CHANNELNET
<b>Target Audience</b>	Forward-thinking Banks and Credit Unions	Banks, Credit Unions, Investment Management Firms and Credit Card Processors	Credit Unions	Financial Institutions, Regional Banks, Credit Unions	Banks and Credit Unions	Banks and Credit Unions	Banks, Credit Card Processors, and FIs	Auto Leasing FIs, Credit Unions, and Banks
<b>Touchpoints</b>	Website, Blog, Twitter, LinkedIn	Website, Twitter, LinkedIn	Website, Blog, Twitter, Facebook, LinkedIn	Website, Twitter, Facebook, LinkedIn	Website, Blog, Twitter, Facebook	Website, Blog, Twitter, LinkedIn	Website, Blog, Twitter, Facebook, LinkedIn, YouTube, Instagram	Website, Blog, Twitter, LinkedIn
<b>Product Label</b>	Marketing Automation Software	Customer Onboarding And Engagement	Customer Engagement Platform	Marketing and Compliance Software	Digital Experience Platform	Automated Marketing Platform	Customer Experience Platform	Digital Engagement Platform
<b>Tone</b>	Functional Informative Consistent	Casual Clear Helpful	Intelligent Professional Matter-of-fact	Corporate Consistent Expert	Complex Patronizing Boring	Simple United Transformative	Positive Confident Modern	Aggressive Trustworthy Professional
<b>Capabilities &amp; Features</b>	Campaign planning Campaign automation Campaign tracking Frequency cap setting Workflow builder Abandonment recovery Landing pages Dynamic forms Auto-fill PDFs Cross-channel experience Digital ads Mobile push notification Text messaging Social campaigns Personalization Cross-channel experience	Account activation and enrollment Abandonment recovery Educate and cross-sell Customer satisfaction tool Personalized microsites Text messaging Email marketing with A/B testing Tools to increase account utilization Smart targeting and personalization Send unlimited communications Account management and support	Customer engagement platform Data cleansing organization and warehousing Email, text (mobile alerts) and print (DM and letters) Reporting tool Enterprise sales tools Finance CRM for loan officers, account openers Prebuilt customizable campaign components Lead management	Digital and automated communications Automated surveys Text messaging Event management Compliance software Compliance services Data monitoring solution Built-in CRM software ID website visitors and sends targeted communications Campaign dashboard and notifications Creative services Website monitoring Data analytics	Digital experience platform "3D StoryTeller" digital experience Personalized FI online banking experience Mobile banking Email marketing Cross-sell	All-in-one marketing platform Segmentations, list building, onboarding schedules Send communications - multi-channel (digital and print) Customizable creative templates Cross-sells and conversions Search trends and SEO Onboarding schedules Design templates Surveys and questions bank Free CRM add-on	Embedded experience in existing FI mobile apps Experience studio with 200+ creative content templates Infrastructure and data management Globals platform management tool Developer portal ROI calculator	Turnkey platform solution Personalized customer microsites with targeted offers Partnership model to complement their core service Secure business portals Customer self-service functionality Strategy and analytics

# COMPETITIVE ANALYSIS






	 Prisma CAMPAIGNS	 CO DIGITAL ONBOARDING	 INTUVO	 MARQUIS	 DeepTarget <sup>®</sup> <small>engage cross-sell measure.</small>	 onovative	 Flybits	 CHANNELNET
<b>Claims</b>	<p>An affordable solution to make bank marketing more efficient</p> <p>Trusted by 30+ banks and credit unions globally</p> <p>25+ years industry experience</p> <p>Prisma Campaigns is the first agile marketing platform designed for small to mid-sized Financial Institutions to deliver personalization at scale</p> <p>Deeper customer relationships and increased share of wallet</p>	<p>Turn account openers into loyal, deep, and profitable relationships</p> <p>Expand existing relationships</p> <p>Backed by our team of experts</p> <p>Top-rated by customers</p> <p>Deepen customer relationships</p> <p>Become the financial institution of choice</p> <p>Maximize checking account activation rates</p> <p>Maximize card transaction volume</p>	<p>35% increase in loan volume, 25% increase in borrower satisfaction, 100% boost to pull-through rates</p> <p>44% increase in auto purchase closings, 15% increase in cross-sell, 56% increase in mortgage purchase closings</p> <p>Build stronger borrower relationships with a single platform that unifies marketing and sales</p> <p>Experience up to a 20% boost in loan closings within a year of implementation</p> <p>Boost close ratios 100% with Intuvo's lead management system</p>	<p>Confidence and insight to make informed decisions, achieve your vision and deliver measurable results</p> <p>CULytics list of Best 10 Marketing Automation Technologies that help Credit Unions in the marketing process</p>	<p>40x Industry standard rates, 25% revenue growth, 500% ROI</p> <p>A transformative 3D user experience with personalized financial stories</p> <p>Connect with your customers with messages that resonate</p> <p>Success you can measure</p> <p>Grow deposits. Increase loans. Gain loyalty. Boost revenue.</p>	<p>Core iQ is the most aggressively priced all-in-one communication platform on the market today</p> <p>We can help you grow revenue with your new and existing relationships</p> <p>A 21st century MCIF for banks &amp; credit unions</p>	<p>151% increase in digital adoption</p> <p>312% increase in offer redemption</p> <p>250% increase in customer engagement</p> <p>Better data = better engagement = better results</p> <p>We bring wisdom and meaning to your data universe</p>	<p>66% email open rate, 25% click to open, 2:41 avg time spent on page</p> <p>7.3% customers interacted with cross-sell content</p> <p>35% unique customers returned to personal page in less than one day</p> <p>60.3% engage through mobile and personal pages</p> <p>One-to-one personalization at scale</p>
<b>Differentiators</b>	<p>Tailored for banks and credit unions</p> <p>Agile mindset</p> <p>Trusted partner who helps our customers meet today's and tomorrow's challenges with flexibility, commitment and creativity</p> <p>Data partner network to complement core offering</p> <p>Open partner ecosystem</p>	<p>The digital engagement platform built for financial services</p> <p>Use-cases for their solution</p> <p>Ongoing strategic support</p> <p>Comprehensive resources</p>	<p>Automated marketing and sales for financial institutions</p> <p>Single platform that unifies marketing and sales for effective cross-selling, higher close rates</p> <p>Pure Data Sync engine is a data ETL tool requiring less than 20 hours from IT to implement</p>	<p>CRM software to improve service, efficiency and sales</p> <p>Offers a new generation of compliance software</p> <p>Personalized service to every client</p> <p>Credit union focused professional services team</p>	<p>Digital marketing software with personalized, targeted offers</p> <p>Digital customer experiences for cross-selling</p> <p>Free lite version for FIs to communicate to customers during Covid-19</p> <p>Companion app for lite version</p>	<p>An email marketing system, connected to FI's core</p> <p>Value-based with price transparency</p> <p>Automation to make onboarding, cross-selling and customer feedback seamless</p> <p>Survey tool connecting insights to customer accounts</p> <p>Free marketing resources</p>	<p>No need to re-engineer existing data infrastructure</p> <p>Helping customers using AI to power relevant and timely content</p> <p>Content integration with app offers seamless experience</p>	<p>Target and personalize with personalized pages</p> <p>Available in over 45 languages in more than 30 countries</p> <p>Provides managed service for a flat monthly fee</p> <p>5 of the top 10 global automotive finance companies are clients</p> <p>Partner network to complement core offering</p>



# COMPETITIVE ANALYSIS

								
<b>Tagline</b>	N/A	N/A	More loans. Simplified.	N/A	Engage. Cross-sell. Measure.	N/A	Be more than a bank.	N/A
<b>Slogan</b>	All-in-one marketing automation software for banks and credit unions.	We make financial services accessible.	Marketing automation simplified.	Assemble, analyze, and act on data.	N/A	Deepen relationships with data.	An end-to-end experience design platform.	The customer experience reinvented.
<b>Elevator Pitch</b>	Prisma Campaigns is the first agile marketing platform designed for small to mid-sized Financial Institutions to deliver personalization at scale. By leveraging existing data, banks and credit unions can segment and execute relevant, personal and contextual communications across all channels in order to make each client feel seen and heard. The result? Deeper customer relationships and increased share of wallet. Prisma Campaigns is a spin-off of Infocorp.	DigitalOnboarding, Inc. is a SaaS technology company focused on helping banking customers and credit union Members activate their financial services products. Digital Onboarding provides a fully automated new account activation platform that is more efficient and effective than traditional phone calls, e-mails, direct mail, and print brochures, driving profit by increasing new customer and Member activation rates.	Intuvo, a CU Direct company, is a leading marketing automation software platform to the credit union industry. Intuvo helps credit unions grow their lending business by automating the analysis of their customer base and then triggering personalized marketing via email, direct mail and text messaging. Intuvo's marketing automation tools are customized and deployed within 30 days, unlike traditional and generic CRM and marketing automation platforms. Industry-leading organizations leverage Intuvo's solutions to effectively increase borrower satisfaction and loan volume.	Marquis Software Solutions, a Plano, Texas-based financial services market leader, provides marketing and compliance software and expertise to assemble, analyze and act on financial institutions data. Marquis gives over 700 clients the confidence and insight to make informed decisions, achieve their vision and deliver measurable results.	DeepTarget helps financial institutions integrate data sources for the purpose of driving meaningful digital engagements that yield more loans and deposits. Their solutions help financial institutions connect with their customers with messages that resonate. DeepTarget's intelligent digital marketing and sales solutions are used by hundreds of financial institutions to provide a seamless communications experience wherever, whenever, and however their customers bank.	Onovative creates simply powerful communication software to put control back in the hands of community banks and credit unions. Core iQ, Onovative's primary product offering, is the first all-in-one communication platform designed specifically for banks and credit unions.	Flybits is the leading customer experience platform for the financial services sector, delivering personalization at scale. With the most advanced capabilities in the market, its enterprise-level solution brings relevant content, products, offers, and information to a bank's digital channels based on what each individual customer needs in the moments that matter. With Flybits, banks are able to design, launch, and measure data-driven consumer experiences that deliver the right information to the right customer at the right time, while preserving their privacy.	ChannelNet is a SaaS leader and pioneer in delivering member engagement and retention via web-based and mobile solutions that work across sales and service channels. Using its patented member engagement platform connects credit unions with their members to engage, inform and learn about financial products and service. Based in Dearborn, Michigan, ChannelNet is a privately held company founded more than 35 years ago.

# COMPETITIVE ANALYSIS

								
<b>Problem/ Solution Messaging</b>	<p>Improve open and click rates by trying out different subjects, artwork and copy to see which one performs best</p> <p>Easily plan and prioritize your campaigns across all your channels and categories with one single calendar showing all that is being delivered</p> <p>Increase conversions with frictionless processes and digital workflows</p>	<p>Send instant emails &amp; SMS texts to engage customers and reduce CPAs</p> <p>Personalized landing pages to drive enrollment</p> <p>Outperform DM with targeted and relevant digital cross-sells</p> <p>Automatic targeting to reach the right audiences</p> <p>Use any datapoint to deliver personalized communications</p> <p>Drive SMB profitability, increase adoption of other services and grow fee income</p> <p>Scale customer service with realtime communications &amp; surveys</p>	<p>Adjust campaigns on the fly with One Touch</p> <p>Targeted emails to build engagement, nurture new leads, syncs with LOS and Core</p> <p>Loan retention solution to ensure new opportunities have best chance of closing</p> <p>Intuvo syncs directly with your LOS system to identify offers based on real-time activity</p> <p>Intuvo provides financial institutions with the tools needed to increase loan volume by combining marketing automation, data analytics, ready-to-use content, and client relationship management (CRM) into one platform</p> <p>Software to Empower the Marketing Department</p>	<p>Leverage the strength of our technology, consultants, analysts and creative services to extend your reach</p> <p>CRM software that improves service, efficiency and sales</p> <p>We give you the confidence and insight to make informed decisions, achieve your vision and deliver measurable results.</p> <p>Marquis takes the burden out of the detailed work of building a sophisticated multi-channel automation strategy</p>	<p>Move from siloed communications and campaigns to a centralized customer experience</p> <p>Utilize data mining and business intelligence to deliver targeted communications across digital media</p> <p>Effectively and affordably connect to their customers with personalized and targeted marketing</p>	<p>Connecting events with customer accounts deepens level of personalization - CRM at scale</p> <p>We create simply powerful communication software to put control back in the hands of community banks and credit unions</p> <p>We believe in the power of human connection and that human connection should be simple</p> <p>We help banks and credit unions automate communications based on activity and interests</p> <p>Core iQ lets you communicate across channels with new and existing relationships</p> <p>Grow revenue without being locked into a multi-year agreement at an outrageous price</p>	<p>Flybits embeds a multi-dimensional contextual lens across every mobile customer experience</p> <p>Serve your customers with AI-driven, real-time recommendations</p> <p>Data is the new asset class and trust the new currency</p> <p>We power a branch in your pocket, turning an app into a destination</p>	<p>Orchestrate engagement and curate content</p> <p>Build a relationship with your customer</p> <p>Technology that cuts through the clutter</p>
<b>Grade</b>								

# PRISMA / BRAND MESSAGING

## VALUE PROPOSITION

### Industry

Prisma Campaigns is the omnichannel marketing automation software for banks and credit unions.

### Audience

We serve forward-thinking customers in multiple geographies and foster a culture of innovation and partnership within the financial institution ecosystem.

### Promise

Prisma Campaigns empowers Financial Institutions to stay relevant in a competitive and challenging environment by developing deep and empathic relationships with their clients through personalized marketing campaigns that drive true value.

## POSITIONING/ DIFFERENTIATION

Given the pace and the intensity of change, we believe in embracing an agile mindset and developing the ability to adapt to whatever comes, faster than your competition. This is why at Prisma Campaigns, we offer more than an automation platform with powerful features, we're a trusted partner who helps our customers meet today's and tomorrow's challenges with flexibility, commitment and creativity.

## SLOGAN

**All-in-one marketing automation software for banks and credit unions**



## PRODUCT LABEL

**Marketing Automation Software**

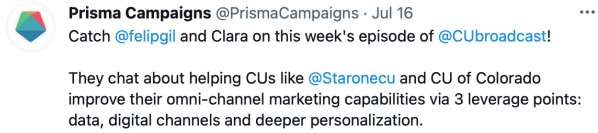
## MESSAGING STYLE

Emotional  
Unique Selling Proposition  
Generic ▾  
Positioning  
Brand image  
Preemptive ▾

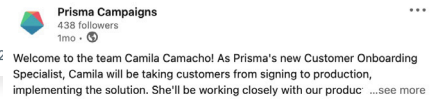
## TONE

Functional  
Informative  
Consistent

# PRISMA / SECONDARY MESSAGING



[cubroadcast.com/episodes/2623-...](https://cubroadcast.com/episodes/2623-...)



## NEWS & ANNOUNCEMENTS

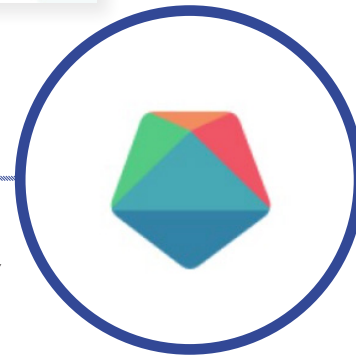
*"Trusted by 30+ banks and credit unions globally"*

## SALES & MARKETING

*"All-in-one marketing automation software for banks and credit unions"*

*"Schedule a demo"*

*"Ready to join top companies using Prisma Campaigns?"*



*"Prisma Campaigns leverages your data to send personalized, omnichannel marketing campaigns that boost loyalty and share of wallet"*

*"Emerging from the pandemic –what we're hearing"*

*"An essential guide for banks and credit unions to unlocking ROI, even with limited resources"*

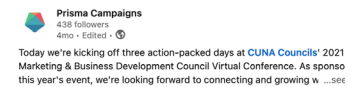
*"Marketing automation and personalization insights for banks and credit unions delivered to your inbox"*

*"The Digital Marketing Playbook for Financial Institutions: An essential guide for banks and credit unions to unlocking ROI, even with limited resources"*

## EDUCATION & THOUGHT LEADERSHIP

*"Three pillars of a strong UX for your financial institution"*

## EVENTS



# DIGITAL ONBOARDING / BRAND MESSAGING

## VALUE PROPOSITION

### Industry

Digital Onboarding is a SaaS technology that offers a fully automated digital engagement platform that is purpose-built for financial institutions.

### Audience

Our platform helps banks, credit unions, investment management firms, and credit card processors grow.

### Promise

We make financial services accessible. Our platform makes it easy for people and businesses to adopt products and services that make life better.

## POSITIONING/ DIFFERENTIATION

When people and businesses feel financially secure, they can achieve and enjoy the things that matter most. Institutions should make it simple for customers and members to access and use financial services. Institutions that do this well have a competitive advantage and do a great service for their communities. We're on a mission to help.

## SLOGAN

**Digital Onboarding is the digital engagement platform that helps financial institutions and customers thrive.**



## PRODUCT LABEL

**Onboarding and New Account  
Activation Software**

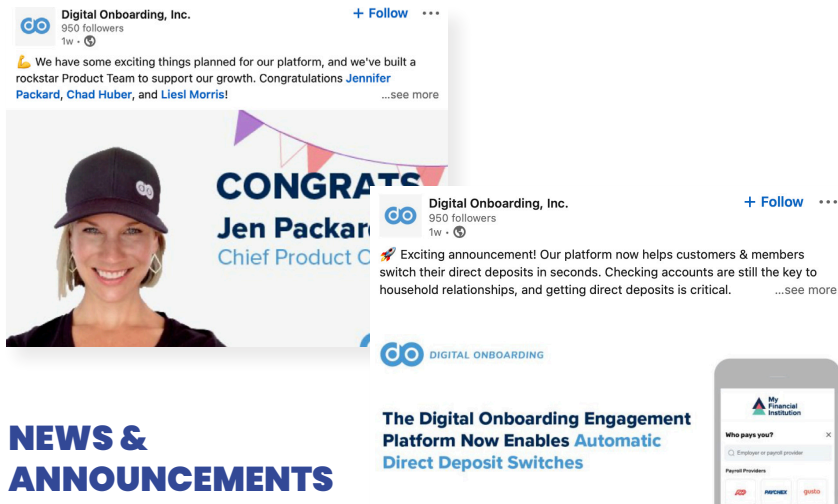
## MESSAGING STRATEGY

Emotional  
Unique Selling Proposition  
Generic   
Positioning  
Brand Image   
Preemptive

## TONE

Casual  
Clear  
Helpful

# DIGITAL ONBOARDING / SECONDARY MESSAGING



## NEWS & ANNOUNCEMENTS

## SALES & MARKETING

***"Book a demo."***

***"Increase customer & member profitability & loyalty. Deliver intelligent cross-sell campaigns that convert."***

***"Turn account holders into engaged & profitable relationships."***

***"Plug the leaks in your marketing funnel. Grow your business."***

***"It costs a lot to acquire new accounts. Make your investments pay off."***



***"Here's our advice for banks & CUs that want to turn new account openers into engaged & profitable long-term relationships. Check it out!"***

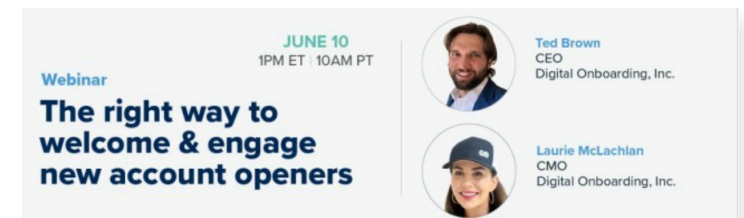
***"Check out our article on page 16! Institutions focus SO much on selling. Yet the gold lies in the middle of the funnel."***

## EDUCATION & THOUGHT LEADERSHIP

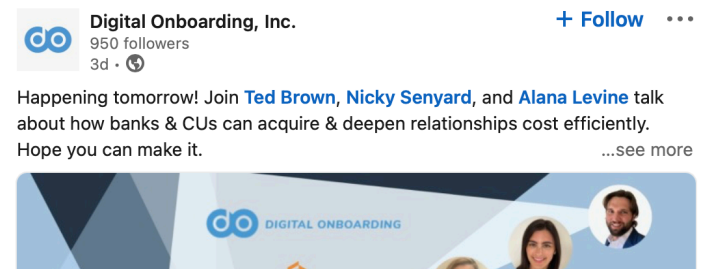
***"Turning account holders into engaged relationships."***

***"Learn how First Bank Of Alabama, Leader Bank, and Somerset Trust Company use our platform to drive results."***

***"We're on a mission to retire the old 2x2x2 onboarding strategy."***



## EVENTS



# INTUVO / BRAND MESSAGING

## VALUE PROPOSITION

### Industry

Intuvo provides financial institutions with the tools needed to increase loan volume by combining marketing automation, data analytics, ready-to-use content, and client relationship management (CRM) into one platform.

### Audience

Intuvo's marketing and sales engine is designed specifically for the success of credit unions of any size.

### Promise

Build stronger relationships with your borrowers with a single platform that unifies marketing and sales for effective cross-selling, higher close rates, and happier borrowers.

## POSITIONING/ DIFFERENTIATION

By combining automated marketing, data analytics, content, and client relationship management (CRM) into one platform, Intuvo ensures credit unions are sending out the right message to the right member at the right time.

## TAGLINE

**Marketing automation simplified.**

## SLOGAN

**The digital engagement platform built for financial services.**



## PRODUCT LABEL

**Customer Engagement Platform**

## MESSAGING STYLE

Emotional  
Unique Selling Proposition  
Generic   
Positioning  
Brand image  
Preemptive

## STONE

Intelligent  
Professional  
Matter-of-fact

# INTUVO / SECONDARY MESSAGING

March 22, 2018 in [Client Success](#), [Company News](#), [Industry Related](#)

## Bethpage FCU Expands use of Intuvo's Digital Marketing Solutions to Advance Member Onboarding Success

"With the significant improvement we saw in net promoter scores for mortgage processing, we wanted to leverage the Intuvo system beyond mortgage lending and implement a new member onboarding trigger program to deepen member relationships," notes Jerry Schmitt, senior vice president ma



September 21, 2017 in [Company News](#), [Industry Related](#)

## Intuvo Makes Inc. 5000 List of America's Fastest-Growing Private Companies

Inc. Magazine ranked Intuvo in the top twenty-four percent of companies on its 36th annual Inc. 5000 List. The list is the most prestigious ranking of the

## NEWS & ANNOUNCEMENTS



August 11, 2018 in [Banks](#), [Business](#), [Consulting Management](#), [Technology](#)

## Deploying Marketing Automation for the Credit Union

By Jeff Shood All businesses feel the need for speed. But what good is that increased activity if your aim is off? Technology has long been sold the promise of providing better, cheaper and f

## Should Your Credit Union be Writing More Mortgage Business?

Credit Unions that win more home finance business stand to gain some significant benefits, according to a new white paper just published on our website. The news was released earlier today. In the white paper, Intuvo CEO Jeff Shood pointed to a number of benefits credit unions could enjoy by helping more members finance homes...

[mortgage](#)

## EDUCATION & THOUGHT LEADERSHIP



**"Build stronger borrower relationships with a single platform that unifies marketing and sales."**

## SALES & MARKETING

**"44% Increase in Automotive Purchase Closings"**

**"Once set up, you'll spend less than five hours per month managing the system."**

**"The Next Generation of Marketing Automation and CRM."**

**"Get Leads From Everywhere and Track Them to Close"**

**"15% Increase in Cross-Sell"**

**"The Right Person. The Right Message. The Right Time."**

## EVENTS

NONE



# MARQUIS / BRAND MESSAGING

## VALUE PROPOSITION

### Industry

Marquis, a financial services market leader, provides marketing and compliance software and expertise to assemble, analyze and act on your data.

### Audience

Data-driven solutions designed exclusively for financial institutions.

### Promise

To make it easier for our clients to assemble, organize and translate complex customer data, behaviors and needs into actionable solutions for their customers.

## POSITIONING/ DIFFERENTIATION

*(Company)* Marquis is the trusted provider of data-driven analytics software, services, and solutions enabling financial institutions to take action and provide tangible results.

*(Marketing Suite)* Marquis assembles data sources and provides the tools and expertise to analyze and understand consumer relationships and opportunities.

## TAGLINE

**Assembly. Analysis. Action.**



## PRODUCT LABEL

**Marketing and Compliance Software**

## MESSAGING STYLE

Emotional  
Unique Selling Proposition   
Generic   
Positioning   
Brand image  
Preemptive

## TONE

Corporate  
Consistent  
Expert

# MARQUIS / SECONDARY MESSAGING

***"The Consumer Financial Protection Bureau (CFPB) Annual Complaint Report Highlights More Than a Half-Million Complaints Received in 2020"***

***"CUNA News Podcast – Marquis Sponsored: Integrating Data to Deepen Member Relationships"***

***"Marquis Gives Back to Tennessee"***

***"Marquis Gives Back to Texas Scottish Rite Hospital for Children"***

## NEWS & ANNOUNCEMENTS

***"The Future of Compliance Will Require Clean Data Sets"***

Marquis  
1,231 followers  
2w · 🌐

After executing an extensive analysis of campaign performance for client campaigns we managed and produced, we're ready to share results and tell you what works. Watch our latest Thought Leadership video featuring Me...see more

What Works? An Analysis of Campaign Results and Best Practices.  
Part 4: The Power of Triggers  
Featuring Marquis' CMC

Marquis  
1,231 followers  
1mo · 🌐

When the COVID-19 pandemic began, the government stepped up with the CARES Act, putting a moratorium on foreclosures for federally funded mortgages until June 30, 2021. Unless the moratorium is extended once again, an unprecedented 1.7 million cases will exit forbearance programs in the fall. Check out our latest Thought Leadership article to learn about how the end of the moratorium on mortgage foreclosures affects financial institutions.  
<http://ow.ly/Ou6k50Fa7Yj>

#Marquis #Compliance #Fintech #Data #DataAnalytics #BankingTechnologies #FinancialServices

The End of the Moratorium on Mortgage Foreclosures and How It Affects Your Financial Institution

***"If you are looking for information on industry topics, case studies, RFP, or ideas to help increase your performance, click on any of the links below to get more information."***

***"By assembling data in meaningful ways, analyzing the patterns that occur over time, and then translating that information into effective action, Marquis is transforming the concept of data-driven marketing."***

## SALES & MARKETING

***"Marketing and compliance software and expertise to assemble, analyze and act on your data."***

***"Keeping clients informed and in touch should be as easy as talking to them."***

***"DocuMatix is our digital marketing suite designed specifically for financial institutions. More than email, it combines key digital and mobile marketing tools in one intuitive interface."***

***"The one-stop solution for online communication."***

***"Leverage the strength of our technology, consultants, analysts and creative services to extend your reach."***



## EVENTS

Marquis  
1,231 followers  
3w · 🌐

We are proud to sponsor the [American Bankers Association](#) and [Illinois Bankers Association](#) Women's Leadership Symposium tomorrow! Be sure to join the facilitated discussion with Marquis' CEO, Susan R. Faulkner, as si...see more

Marquis Solutions  
June 23 · 🌐

We are excited to be at [The Utah Bankers Association](#) 113th Annual Convention in Sun Valley, ID next week! If you're attending, be sure to stop by Marquis booth #112 to meet our team and enter for the chance to win a \$250 gift card! #UBACONV2021 #MarquisSolutions #DataAnalytics #Data #Fintech #Marketing #FinancialServices #BankingTechnologies

ABA/IBA  
WOMEN'S LEADERSHIP  
SYMPOSIUM  
JULY 13, 2021

UTAH BANKERS  
ASSOCIATION  
113TH ANNUAL UBA CONVENTION  
JUNE 27-30, 2021

VISIT THE MARQUIS BOOTH FOR A CHANCE TO WIN A \$250 AMAZON GIFT CARD!

# DEEP TARGET / BRAND MESSAGING

## VALUE PROPOSITION

### Industry

DeepTarget is a digital marketing software company delivering proven online and digital media solutions in Financial Services.

### Audience

For banks and credit unions ready to take their digital marketing up a notch without a lot of extra effort by their marketing teams.

### Promise

To help businesses effectively and affordably connect to their customers with personalized and targeted marketing.

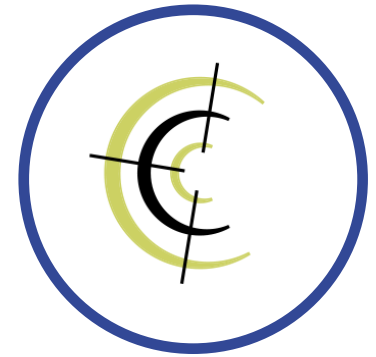
## POSITIONING/ DIFFERENTIATION

The company's focus is on marketing software that utilizes data mining and business intelligence in order to deliver targeted communications across digital media.

Complete Saas platform.

## TAGLINE

**Engage. Cross-sell. Measure.**



## PRODUCT LABEL

**Digital Experience Platform**

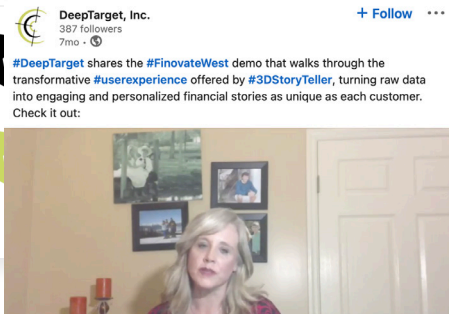
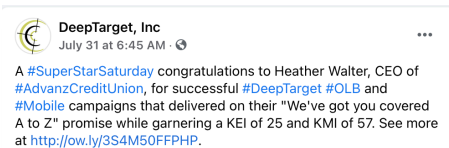
## MESSAGING STYLE

Emotional  
Unique Selling Proposition  
Generic   
Positioning   
Brand image  
Preemptive

## TONE

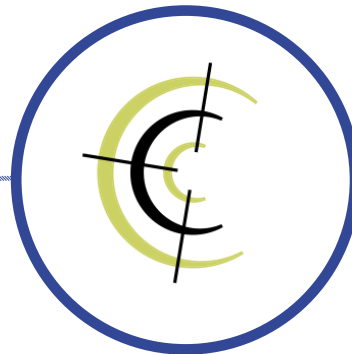
Complex  
Patronizing  
Boring

# DEEP TARGET / SECONDARY MESSAGING



## NEWS & ANNOUNCEMENTS

**"DeepTarget Posts Record Sales and Revenues for 2019."**



## SALES & MARKETING

**"Seeing is Indeed Believing."**

**"In our data-driven world, you should be certain about your digital ROI."**

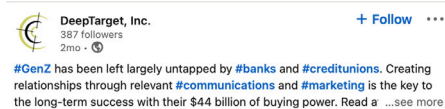
**"This intelligent solution integrates across digital channels to deliver results by making your FIs marketing smarter and easier than ever before."**

**"One, Powerful Solution"**

**"Launch Demo"**

**"DeepTarget does all the heavy lifting"**

**"Grow revenue without being locked into a multi-year agreement at an outrageous price."**

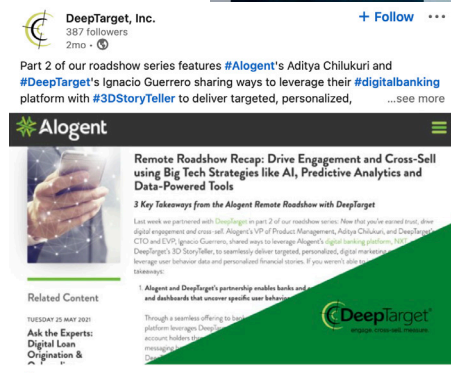
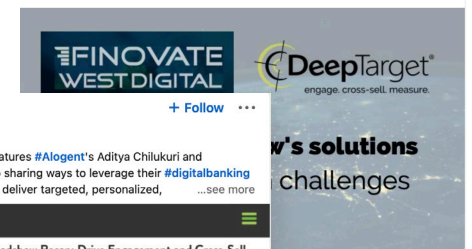
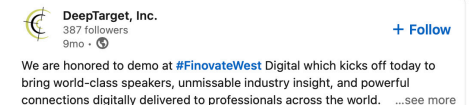


**How to Reach Gen Z**

**Eight Simple Ways To Turn Up The Volume Of Your Digital Marketing**

## EDUCATION & THOUGHT LEADERSHIP

## EVENTS



**"Holiday Campaigns Made Simple with DXP"**

**"Three Present-Day Goals to Revolutionize Your Marketing"**

# ONOVATIVE / BRAND MESSAGING

## VALUE PROPOSITION

### Industry

Onovative's automated marketing platform enables banks and credit unions the ability to segment account holders, communicate effectively based on their current and likely next product, and consolidate multiple marketing functions in one user-friendly platform.

### Audience

Onovative creates simply powerful communication software to put control back in the hands of community banks and credit unions.

### Promise

The Onovative marketing technology platform strengthens existing marketing solutions built on data, simplicity, and affordability for community banks and credit unions.

## POSITIONING/ DIFFERENTIATION

Core iQ, Onovative's primary product offering, is the first all-in-one communication platform designed specifically for banks and credit unions.

## TAGLINE

**Data, simplicity, and affordability.**



## PRODUCT LABEL

**Automated Marketing Platform**

## MESSAGING STYLE

Emotional  
Unique Selling Proposition  
Generic ▽  
Positioning  
Brand Image ▽  
Preemptive ▽

## TONE

Simple  
United  
Transformative

# ONOVATIVE / SECONDARY MESSAGING

*"Deepen Relationships With Data"*

*"We are proud to partner with community banks who are the backbone for so many towns and neighborhoods. From all of us at Onovative - thank you for all you do!"*

*"We create simply powerful communication software to put control back in the hands of community banks and credit unions."*

*"Only a few more days left to register for our educational webinar event exclusively for financial marketers! If you're involved with marketing at a bank or credit union - this webinar is tailored specifically for you."*

*"We believe in straight forward, affordable pricing. Learn how Core iQ fits into your financial institution's specific budget."*

Main Street, Inc.  
2,257 followers  
9mo · 🌐

+ Follow ...

To further our 20+ year commitment to community financial institutions in a time when leveraging technology is critical for success, we've expanded our solutions to include Onovative, an affordable marketing software provider for planning, automation and execution.

Access FREE resources and learn more:

## SALES & MARKETING

*"Core iQ lets you communicate across channels with new and existing relationships."*

## NEWS & ANNOUNCEMENTS

*"Marketing Automation Connected To Your Core"*



*"Ready to make better offers to your account holders?"*

*"Wishing you could automatically send product offers and onboarding communications across all channels with one, simple solution? "*



## EDUCATION & THOUGHT LEADERSHIP



Learn 3 ways you can achieve personalization through your marketing...



Connect with your account holders by sharing back-to-school tips to...

Onovative  
1,269 followers  
2d · 🌐

+ Follow ...

Only one more day until the [Kansas Bankers Assn](#) CEO & Senior Management Forum/Annual Meeting! Find us at the golf tournament to grab some golf SWAG & hear about how Core iQ can enable you to up your marketing game.

<http://jow.ly/Ph4050Fixh>

## EVENTS

**CEO and Senior Management Forum**  
BROADMOORE • COLORADO SPRINGS, CO  
**AUGUST 5-7, 2021**  
KANSAS BANKERS ASSOCIATION

Leveraging Technology to Drive Marketing Success | Webinar

Event ended  
**Leveraging Technology to Drive Marketing Success | Webinar**  
Event by Onovative

# FLYBITS / BRAND MESSAGING

## VALUE PROPOSITION

### Industry

Flybits is the leading customer experience platform for the financial services sector, delivering personalization at scale.

### Audience

- FIs, banks, credit unions
- Data and digital teams

### Promise

Empowering you to bring meaning and wisdom to the data that surrounds every customer, inspiring them to live their best lives.

Create value beyond your financial assets, and inspire your customers to live their best lives.

## POSITIONING/ DIFFERENTIATION

Flybits was first in the world to launch a cloud-based context-as-a-service™ solution. The world's first and only cloud-based context-as-a-service.

## TAGLINE

**Be in the moments that matter.**



## PRODUCT LABEL

**Customer Experience Platform**

## MESSAGING STYLE

- Emotional ▾
- Unique Selling Proposition ▾
- Generic
- Positioning
- Brand Image ▾
- Preemptive ▾

## STONE

- Positive
- Confident
- Modern

# FLYBITS / SECONDARY MESSAGING



Flybits creates new advisory board to elevate the role of financial institutions in the new data economy



Flybits gains international recognition across growth, culture, and innovation in 2020

DECEMBER 16, 2020

***"We're honoured to be recognized as a top 50 AI startup with Unicorn potential"***

## NEWS & ANNOUNCEMENTS

***"This is Federico De Simoni, Head of Latin America at Flybits. Aside from knowing..."***

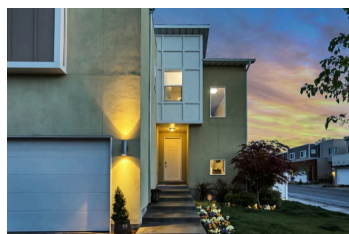


How banks can deliver a customized, personalized experience

DOWNLOAD



**How to Become Your Customers' Primary Bank**



10 Mortgage Use Cases That Will Boost Results

DOWNLOAD

## EDUCATION & THOUGHT LEADERSHIP

***"We incorporate privacy-by-design, to create impactful experiences that build trust"***

## SALES & MARKETING

***"Flybits is a champion for better data"***

***"Be more than a bank"***

***"How do you unlock the power of AI to deliver contextual and predictive recommendations to your customers in as little as one week?"***

***"Flybits empowers banks to engage an audience of one, at scale"***

***"A fast lane to elevating your digital channels"***

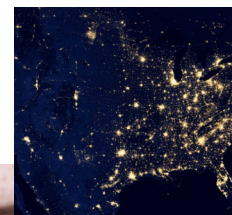
***"Experience Studio enables you to go-to-market 85% faster"***

***"Flybits puts banks in the fast lane"***

## EVENTS

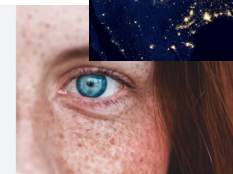
WEBINAR  
Everything you need to know about personalization in banking

Watch the recording



WEBINAR  
Accelerating your bank's digital transformation. What industry leaders are doing today.

Watch the recording



How banks and credit unions can revive the health and vitality of communities

Watch the recording



Flybits  
21,996 followers  
2mo · Edited · 🌐

+ Follow ...

We're hosting a roundtable at DIFC Innovation Month and will be discussing how #fintech partnership ecosystems enable banks in the #MiddleEast and #Africa to deliver the personalized 1:1 experience customers expect, along w ...see more



# CHANNELNET / BRAND MESSAGING

## VALUE PROPOSITION

### Industry

ChannelNet is a leading provider driving digital transformation solutions that integrates marketing, sales, and service channels to drive loyalty and retention in the financial, automotive, and Home Improvement industries.

### Audience

Large enterprises that sell complex products and services through multiple sales channels (online, call center, mobile device or retail outlets).

### Promise

We're a turn-key solution, doing everything for you, including curating content, so that you can quickly and easily see results.

## POSITIONING/ DIFFERENTIATION

We have a fresh new approach that provides digital marketing automation as a service. We combine the creativity of a digital marketing agency with the technical competence of a software technology company.

## TAGLINE

**The customer experience. Reinvented.**



## PRODUCT LABEL

**Omni Channel Marketing Solutions**

*(OneClick Financial)*

**Digital Engagement Platform**

## MESSAGING STYLE

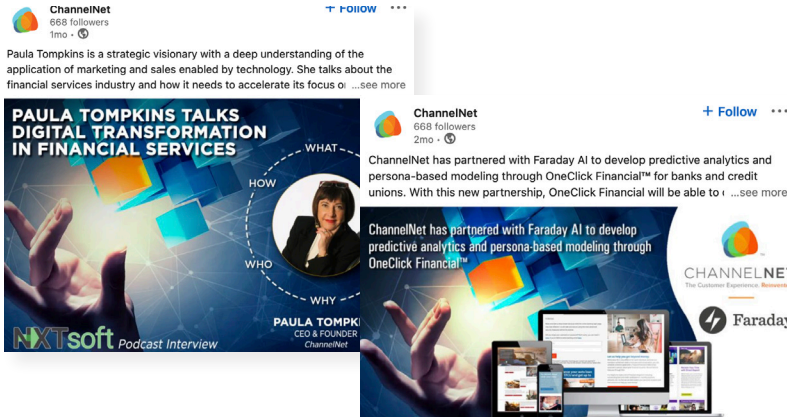
- Emotional ▽
- Unique Selling Proposition ▽
- Generic
- Positioning
- Brand Image ▽
- Preemptive

## TONE

- Agressive
- Trustworthy
- Professional

# CHANNELNET / SECONDARY MESSAGING

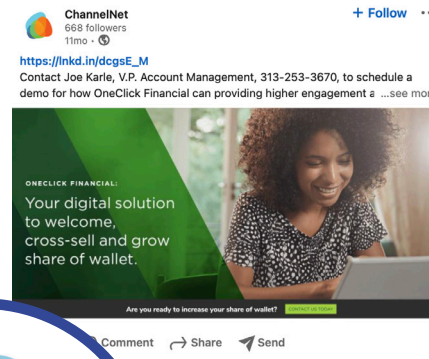
*"Customers are overwhelmed"*



## SALES & MARKETING

*"One platform. Multiple solutions."*

*"Taking you from click-to-brick, bridging the operations and marketing gap to reach the right people to drive leads and build retention."*



*We have more than 30+ years of expertise in delivering customer-centric strategies that capitalize on existing relationships.*

## NEWS & ANNOUNCEMENTS

*"The new digital virtual branches offering takes the next step and enables a local member to interact virtually with human assistance at their branch."*

*"Managing Your Marketing Strategy and Digital Experience."*

*"How credit unions can reduce IT costs and improve productivity."*



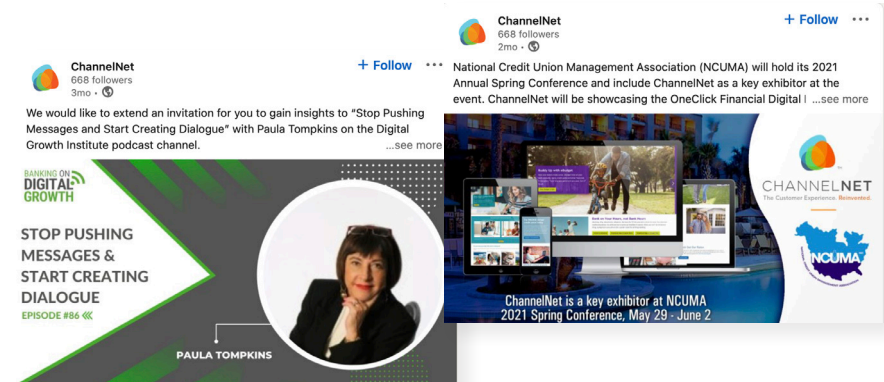
## EVENTS

*"ChannelNet CEO Paula Tompkins Talks Digital Transformation in Financial Services on NXTsoft Podcast."*

## EDUCATION & THOUGHT LEADERSHIP



*"Learn the six key concepts to boost your bank lead generation. Just sending more direct mail and eblasts to customers will not work."*



# COMPETITIVE MESSAGING TAKEAWAYS



## Brand Tone:

**FUNCTIONAL**  
**INFORMATIVE**  
**CONSISTENT**

Prisma Campaigns communicates with its audiences using a mix of product and sales messaging vs. brand messaging or an overall company story. Its functional tone does a good job of guiding customers through the product and the features, but Prisma's principle headlines tend to be jargon-heavy, lacking personality and brand expression. Overall, the messaging is too generic and doesn't signal what the brand stands for.



## Brand Tone:

**CASUAL**  
**CLEAR**  
**HELPFUL**

With statements like "Bill Pay is dead," Digital Onboarding does a good job of explaining industry pain points, its platform and the tools in a casual and sometimes humorous way. The messaging avoids overly complicated sentences, industry jargon and speaks to customers in a familiar and accessible way. Digital Onboarding's website says "Our platform makes it easy for people & businesses to adopt products & services that make life better," and this company value is clear in the simple brand messaging it presents.



## Brand Tone:

**INTELLIGENT**  
**PROFESSIONAL**  
**MATTER-OF-FACT**

While Intuvo's brand messaging alludes to innovation, it lacks overall expression of personality. It focuses on product-specific messaging vs. brand messaging and does a good job of laying out FI goals, problems and solutions solved by its software. In regards to brand messaging and story, Intuvo fails to communicate the company's core values or interests to its audiences.



## Brand Tone:

**CORPORATE**  
**CONSISTENT**  
**EXPERT**

While Marquis' messaging is primarily simple and direct, it lacks consideration for its readers and struggles with maintaining an audience-first approach. The message relies heavily on Marquis' expert positioning and does a good job of signaling brand trustworthiness by talking about the company's longevity and its deep, international bench of analysts and consultants. Marquis describes its process as "Assembly, Analysis, Action" and consistently applies this approach when messaging individual product suites and services.



## Brand Tone:

**COMPLEX**  
**PATRONIZING**  
**BORING**

A plethora of grammar mistakes and run-on sentences makes Deep Target's message hard to understand and its content less accessible than the competitors. Lack of quality in the messaging also leads audiences to question marketing statements on the website such as "Deliver results by making your financial institution's marketing smarter and easier than ever before." Tropes like "Extra, extra read all about it" tend to paint the brand in a silly light, and there is little or no connection to brand values or brand point of view in any of the messaging.



## Brand Tone:

**SIMPLE**  
**UNITED**  
**TRANSFORMATIVE**

Onovative does an excellent job of communicating directly to its audiences. It's simple and direct style of messaging makes the brand and its offerings easy to understand. The company's tone of voice is genuine and asserts Onovative's core belief, ("We believe in the power of human connection and that human connection should be simple") is revealed throughout the messaging in an approachable yet powerful way.



## Brand Tone:

**POSITIVE**  
**CONFIDENT**  
**MODERN**

Flybits shows its audiences concepts of what a happy customer's life could look like, accompanied by a positive voice. Engaging headlines like "Be in the moments that matter" and "Be more than a bank" bring an emotional strategy to the messaging that creates an instant connection to the brand and shows that the Flybits brand is concerned about helping FIs bring meaning to people's lives.



CHANNELNET

## Brand Tone:

**AGGRESSIVE**  
**TRUSTWORTHY**  
**PROFESSIONAL**

With an opening hero that says "Customers are Overwhelmed," Prisma positions its product as the solution to bringing a brand's communications together in one place. The approach feels a bit dated in comparison to the competitors who are educating audiences about the "age of the consumer." Channelnet relies on its longevity in the space and translates that into a more aggressive messaging style than others in the competitive set. Overall, the messaging lacks inspiration and audience connection.

# COMPETITIVE MESSAGING TAKEAWAYS

## BRAND VOICE

Although brand voice and tone are interconnected with one another, there's a distinct difference between them. Brand voice revolves around what is being said and remains consistent with the communications delivered. By having an unchanging voice, audiences are able to perceive the brand as being reliable and understandable. Other major functions of brand voice include setting your brand apart from others and demonstrating the core values and goals your company is striving toward. Our research on Prisma and its competitors defined the following brand voice trends and opportunities in the space.

### UBIQUITOUS TRENDS

*The following concepts are very common in the competitive set:*

**EASY**

**FAST**

**ALL-IN-ONE PLATFORM**

**PERSONALIZED**

**TURN IT ON AND WIN**

**RIGHT MESSAGE, RIGHT TIME**

**AFFORDABLE PRICING**

**IMPROVE CUSTOMER RELATIONSHIPS**

**OMNI-CHANNEL TOOLS**

**MADE SPECIFICALLY FOR BANKS**

### OPPORTUNITIES

*The following concepts are underutilized or niche in the competitive set:*

**DATA & IMPLEMENTATION**

**LONG-TERM STRATEGY**

**CUSTOMER JOURNEY**

**AI-POWERED MARKETING**

**CROSS-FUNCTIONAL TEAMS**

**IMPROVE CONSUMERS' LIVES**

**ONE-TO-ONE MARKETING**

# Prisma Campaigns Messaging Analysis

# SWOT ANALYSIS

## STRENGTHS

- Clear and consistent messaging platform that builds on the strength of Prisma's tools
- "Open platform" and "Integrating with existing tech stack" messaging makes Prisma more accessible than others
- Simplicity when it comes to explaining product features and benefits
- Clearly communicates product features with explainer language and problem/solution messaging

## OPPORTUNITIES

- Play up the agility angle to show how responsive Prisma is to its customers and to show audiences that Prisma is an expert in the quickly evolving environment of automation and AI technologies
- Use Prisma's deep expertise to help audiences identify quick tactical wins using Prisma's software as well as long-term vision for their organization
- Emphasize the "integrates into existing tech message" to bring IT and data managers into the conversation

## WEAKNESSES

- Messaging lacks clear brand point of view
- Doesn't sound or appear like a brand innovator
- Lack of creativity in the types of messaging
- Limited messaging on how Prisma helps with data, implementation, ongoing support for the product

## THREATS

- The importance of secure technology and data protection for banks and credit unions means brands like Prisma need to be in the security conversation
- Emergence of new technology means platforms and offerings are always changing and improving
- The numerous channels for communication available to marketers is only growing. Brands like Prisma need to ensure they are supporting the right mix.

# Areas for Improvement for Prisma Campaigns

# MESSAGING STRATEGY

## INSIGHTS

Mid-size banks have played a vital role of financial intermediation in the US economy and have supported millions of consumers' and businesses' financial needs and dreams for decades. Today, the large banks' massive technology budgets, along with fintechs' and bigtech's intuitive, customer-centric offerings, are increasingly appealing to mid-size bank customers. Automation for the middle-of-the-pack is happening, and it will bring substantial revenue, customer experience and cost benefits to mid-size banks and credit unions worldwide. But those benefits don't arrive overnight. Realizing automation's full potential requires people and technology to work hand in hand and that takes time. Latest research indicates that companies do better by taking an incremental rather than a transformative approach to developing and implementing automation. That's where Prisma comes in.

## NEW POSITIONING

What if Prisma Campaigns were known as **Automation Realists**, equating a long-term approach with incremental steps to good, responsible digital marketing that builds benefits for both the bank and its customers. The aim is to create a message that is both educational and reassuring and positions Prisma's solutions as part of its customers' larger goal of futurizing operations and finding new ways to succeed. In this scenario, part of Prisma's brand identity will work to diminish the idea that you can just turn on marketing automation, walk away and win—dispelling a myth that most competitors push and lifting pressure from clients' marketing, data and IT teams.

### **The full package is only half the story.**

Sure, Prisma Campaigns offers an all-in-one platform with omnichannel communications, one-to-one customer views and "next best" contextual capability, but more importantly it provides its customers with the support they need throughout their marketing automation journey, not just in the beginning. "A platform for growth" is a new brand strategy that will position Prisma as the cutting-edge martech provider that is unafraid to talk about the complexity of bringing real change and real, continuous growth through automation, helping mid-size banks and credit unions with a safe and stepped way to succeed.

#### **Fact:**

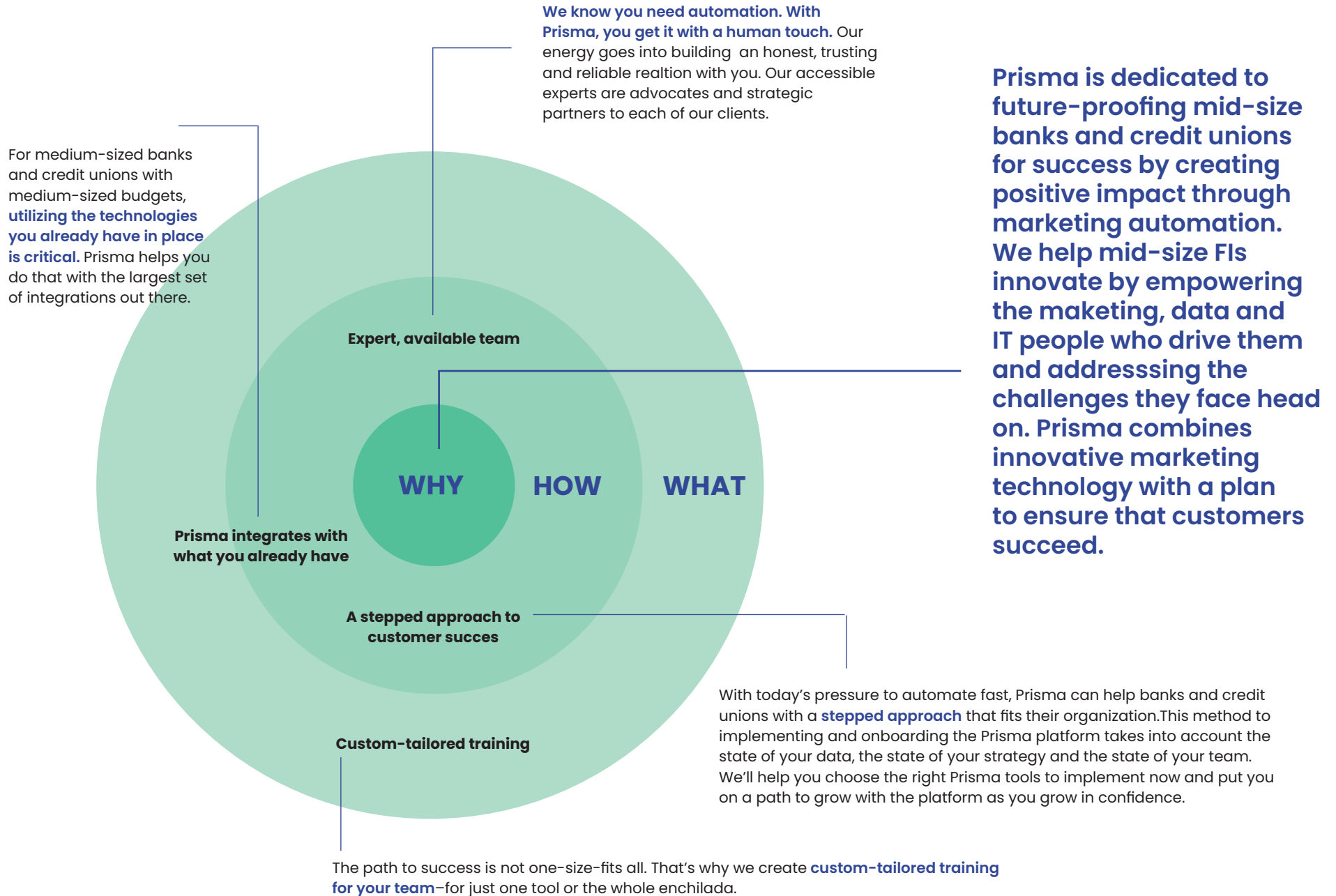
**70% of all Digital Transformation initiatives do not reach their goals.**

#### **Prisma Brand Enemy:**

**Automation initiatives that do not reach their goals.**



# MESSAGING STRATEGY



## NEXT STEPS: DEFINING PRISMA'S BRAND ARCHITECTURE

Successful companies use brand architecture to capture and clarify the way they want consumers to perceive, think and feel about their brand. They are to be used for strategic alignment and inspiration, and are not meant to be consumer facing. Understanding the complexity of the brand-consumer relationship is the first, most crucial step in strategic brand building and drives all subsequent strategic decisions including a brand messaging approach.

### BRAND ARCHITECTURE FRAMEWORK



# PRISMA BRAND ARCHITECTURE

## STRATEGIC TARGET

Marketing automation designed for modern mid-size banks and credit unions.

## CONSUMER INSIGHT

"I know I need marketing automation, but I need to implement it in a way that matches my organization, my data, my time and resources."

---

## KEY BENEFITS

Confidence in knowing your organization is succeeding at marketing automation in a safe, effective and integrated way.

## REASONS TO BELIEVE

We need to explore this!

---

## BRAND VALUES

Transparency, certainty, truth, accountability, accessibility, dependability, confidence

## BRAND PERSONALITY

Thoughtful, flexible, patient

