

From Account Opening to Deeper Relationship

EXPANDING DEPOSIT RELATIONSHIPS THROUGH REAL-TIME PRE-SCREEN

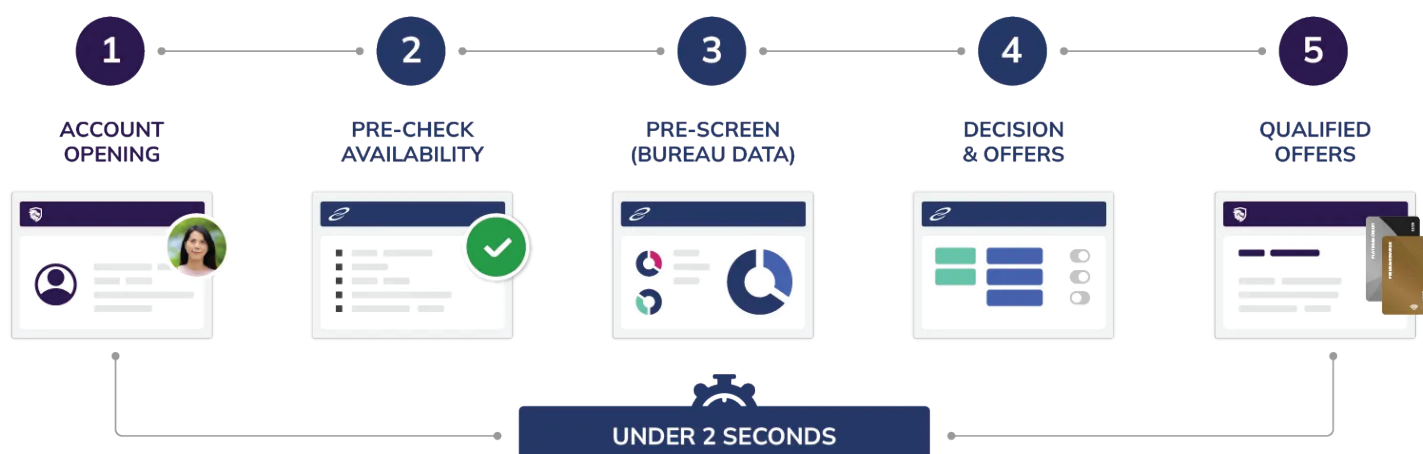
A growing regional bank wanted to help customers find more of the financial products they need while building stronger relationships from the start.

Working with Zoot, the bank turned a routine account opening into an opportunity to grow the customer relationship. By embedding real-time prescreening directly into the teller workflow, qualified credit offers surface at exactly the right moment, while the customer is already engaged.

The Solution

Zoot embedded real-time prescreening directly into the bank's existing teller experience, creating a seamless path from account opening to personalized credit opportunities.

- ✓ **In-Branch Trigger:** Teller initiates prescreening during the customer interaction.
- ✓ **Real-Time Prescreening:** Zoot evaluates the customer across multiple credit products.
- ✓ **Qualified Offers Delivered:** Qualified offers appear instantly in the teller system.
- ✓ **Personalized Conversation:** The banker presents relevant offers to deepen the relationship.



The Impact

The real-time pre-screen process is now part of the bank's branch strategy, helping tellers identify relevant credit opportunities while customers are already engaged.



+150%

Year-over-year Prescreen Growth



~19,000

Candidates Screened Monthly



~ 6000

Real Time Offers Monthly



Multi-Product

Portfolio Growth



Earlier Growth

Increased Lifetime Value

The result is a repeatable growth channel built into everyday customer interaction. By connecting pre-screen directly to the teller workflow, the bank can identify qualified credit opportunities in real time, give tellers a relevant offer to present, and begin building broader, more valuable relationships from the moment a new deposit account is opened.

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*Zoot helped this bank grow its consumer credit program, driving over **150% growth** in pre-screening year over year.*

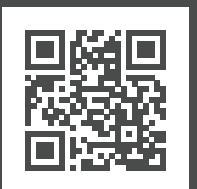
Your Partner in Growth



Turn everyday customer interactions into opportunities for deeper relationships and portfolio growth. Zoot brings real-time intelligence directly into your existing systems, helping your teams identify relevant credit opportunities and deliver personalized offers while customers are engaged, creating more meaningful conversations at the moments that matter most.

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