

# Enterprise Cross-Sell<sup>®</sup>

GROW DEEPER CUSTOMER RELATIONSHIPS

## WHAT DOES IT DO?

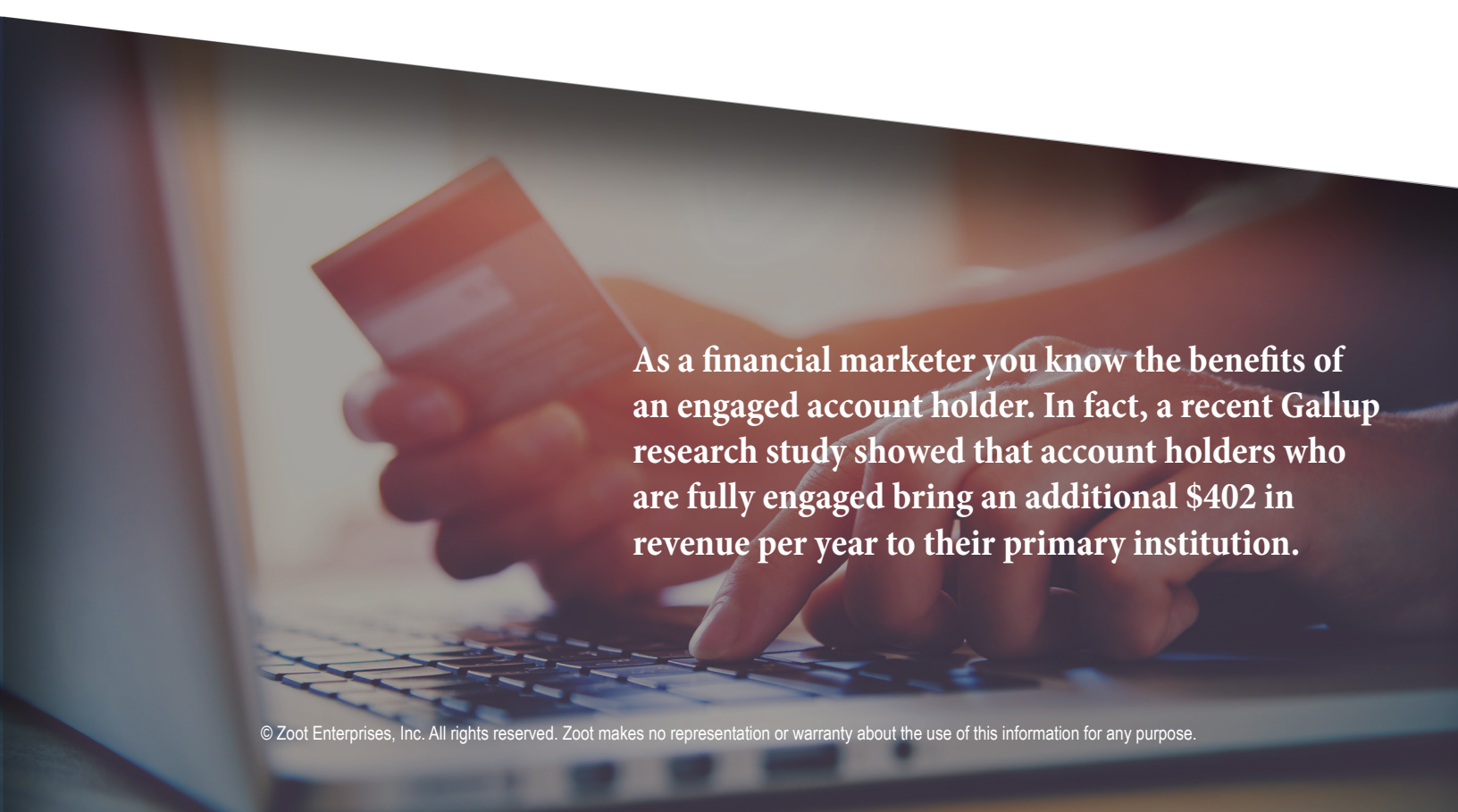
Zoot's enterprise cross-sell platform identifies cross-sell and up-sell prospects and connects offers to the right customer segments – to increase revenue and profitability through organic growth.

## WHY IS IT IMPORTANT?

Zoot's enterprise cross-sell solution helps you gain a unified, integrated customer view, create accurate customer segments and uncover new revenue opportunities. Our solution increases growth, improves efficiency and generates better returns.

## WHO WILL BENEFIT FROM IT?

Banks and financial institutions can promote to customers the different products and services they deliver based on need, behavior or other segmentation criteria. This type of cross-selling can be a highly effective tool for growing business, acquiring new-to-bank clients and enhance customer life time value by encouraging multiple product holdings.

A close-up photograph of a person's hands. The left hand is holding a red credit card, and the right hand is typing on a laptop keyboard. The background is blurred, showing the laptop screen and keyboard.

**As a financial marketer you know the benefits of an engaged account holder. In fact, a recent Gallup research study showed that account holders who are fully engaged bring an additional \$402 in revenue per year to their primary institution.**

**Zoot helps you implement cross-selling programs that add products and strengthen the account holder relationship – with the goal of achieving primary financial institution status with your account holders. The more accounts a customer opens, the more likely they are to be one of your loyal, profitable customers for years to come.**



## Uncover revenue growth with your existing customers

Zoot's enterprise cross-sell solution uncovers new revenue opportunities and propensities in your customer base. Our solution can help you forecast expected customer behavior and flag those customers more – or least – likely to respond to a promotion or identify at-risk customers before they leave.

Our solution enhances organic growth through an enterprise cross-sell capability that seamlessly connects the credit decisioning and loan origination efforts of siloed lines of business. Not only is efficiency increased by sharing business rules, policies, and attributes that are common across the enterprise, but also by having a single connection to vendors, shared data and central offers repository. Additionally, an enterprise cross-sell centralized system reduces maintenance costs and expedites updates to policies.



## Reap the benefits of the mobile revolution

As the popularity of the internet and mobile banking continues to grow, opportunities for face-to-face interactions are at an all time low. Consumers love the anytime, anywhere access a mobile device provides – and savvy marketers know that access goes both ways. Taking advantage of the access mobile provides requires targeting the right customer at the right time – and with the right message. Zoot uses mobile technology to reach consumers with opti-channel, personalized, real-time marketing messages while they are on the move. And when an existing customer accepts a new, relevant offer, you increase revenue, boost wallet share and build stronger relationships.



## The power of increasing the customer portfolio

For most financial institutions, the highest profit is delivered after the initial sale, driving greater and more consistent cross-sell and up-sell revenue from your customer base. Zoot's enterprise cross-sell solution offers an integrated approach to capture growth opportunities within your portfolio – particularly with your highest-potential account holders – those you want to retain most. Through proven data acquisition and prescreen methods, our solution will allow you to extend firm offers of credit to account holders while meeting the needs of your existing account holders.

With a finely tuned cross-sell and up-sell platform behind your business, you'll be able to more effectively:

- Optimize per-customer revenue, increase your wallet share and strengthen 'stickiness'
- Lock-in future revenue with long-term agreements
- Retain value and minimize discounting
- Uncover more opportunities



## Work with the cross-sell and up-sell experts

Zoot manages billions of dollars of revenue opportunity for large financial institutions around the globe. We are the experts on unlocking top-line revenue growth from your existing customer base. With over 25 years of financial technology experience, our dedicated business development teams help the world's leading financial institutions identify and engage in cross-sell and up-sell activities.

**Zoot understands your challenge is keeping customers not only engaged during the account opening process, but throughout their relationship with the financial institution.**

**To request a demo  
or speak with a representative,**



Call (406) 556-7555



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