

LOOKING FOR GROWTH? RETENTION? MARKETING EFFICIENCY? HIGHER ROI?

# MEET YOUR NEW BEST FRIEND AND ROI POWERHOUSE



POWERED BY  
**psympl.**<sup>®</sup>



# IF THIS IS ALL YOU SEE, YOU DON'T SEE ME

Demographics aren't enough.

## WHAT IS IT? IT'S PSYMP<sup>®</sup> Psychographic AI<sup>™</sup>

Psympl<sup>®</sup> identifies distinct psychographic segments that explain how people think about money, risk, and decisions; locates them anywhere in the U.S.; and then generates messages that actually resonate.

When you speak to motivation instead of demographics, engagement and outcomes improve across every channel.

This groundbreaking approach to segmentation analyzes and utilizes data on individuals' attitudes, aspirations, and lifestyles to personalize marketing and customer engagement. Move beyond demographics and behaviors by identifying deep insights into the psychological drivers behind every customer decision.

Psychographic AI<sup>™</sup> enables community banks and credit unions to leverage deeper, underlying motivations, enhancing customer relationships and satisfaction.

We provide the answer to **WHY** your customer makes decisions, increasing engagement and activation through hyperpersonalization.

**Gender:** Female  
**Race/Ethnicity:** Caucasian/White  
**Location:** 5-mile radius  
**Income:** Upper Middle  
**Marital Status:** Married  
**Education Level:** PhD  
**Occupation:** Psychologist

## Increasing Consumer Activation: Brand-Building Framework

### CORE DATA

#### WHO

##### Who is the customer?

- Demographics
- Socioeconomics
- Employment
- Income
- Assets

#### WHAT

##### What are their behaviors?

- Actions
- Service Utilization
- Investment Products
- Asset Distribution

### psympl.

#### WHY

Psychographic Segmentation

##### Why are consumers doing what they do?

- Attitudes and Beliefs
- Values
- Communication Preferences
- Motivations

### MarketMatch

#### HOW

##### How do we influence their actions?

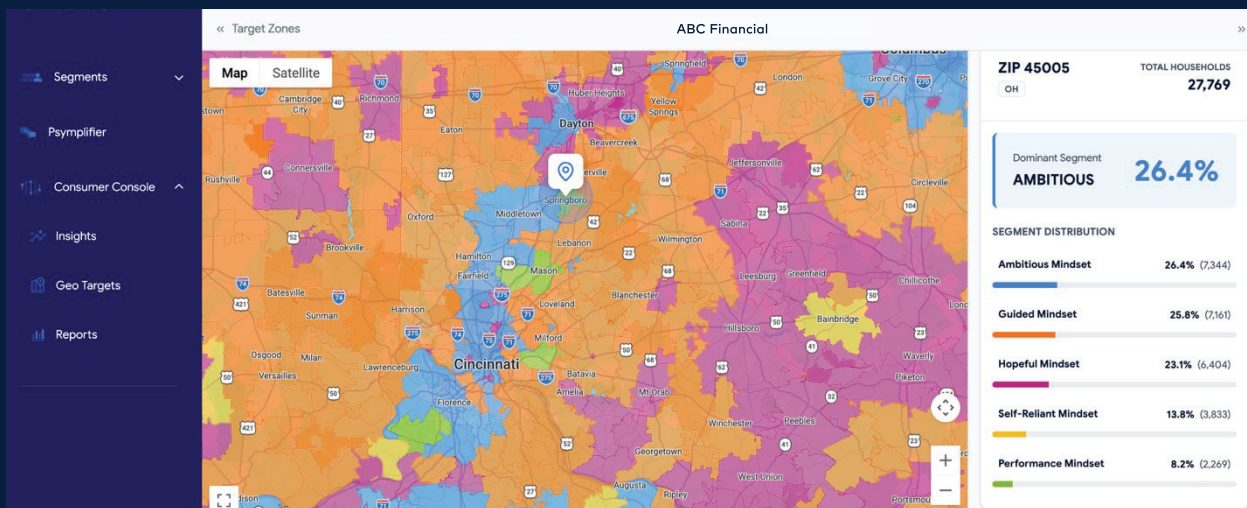
- Communication
- Content
- Channels
- Increased ROI

# WHERE ARE THE BEST TARGETS?

## Psympl Geotargeting

### Identify Market Area Mindsets

In any market across the U.S., we can identify, filter, segment, and map every resident prospect. Through a Psympl-exclusive Experian partnership, key Experian data is enriched to your households and through mindset identification, we can segment your customers and prospects into highly targetable marketing outreach groupings. Then by applying our propensity models, we can pinpoint the best communication channels to deliver a hyperpersonalized, highly relevant and engaging message.

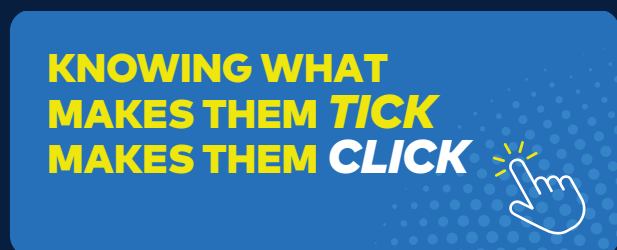
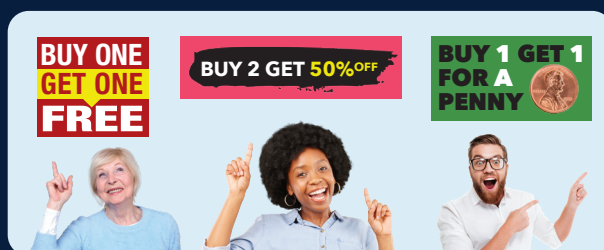


We can map any U.S. ZIP code by Psympl mindset and apply additional filters such as age, income, investable assets, and gender.

### HOW DOES IT WORK?

Understanding the attitudes, beliefs and motivations — the mindsets — of your customers and prospects can help you deliver more powerful, connective marketing and engagement and positive ROI outcomes.

### Different People Respond to Different Ways of Saying the Same Message



# WHERE WILL I DRIVE RESULTS?

With MarketMatch driving strategy, deploying Psympl mindsets and creating hyperpersonalized, relevant content, the impact will be seen across the organization!

## Psymplified Use Cases

### Acquisition

- Targeted prospects
- Targeted prospects in targeted geographies for targeted products

### Retention

- Focused retention
- Pre-attrition risk identification
- Balance retention

### Communication

- Payment/collections efforts
- Customer notices
- Website navigations
- Social posts

### Product Evaluation

- Assess usage composition
- Match product outreach to persona
- Develop new products

### Organic Growth

- Customer segmented cross-sell
- Wealth transfer

### New Market Outreach

- Branch network assessment
- M&A market assessment

## ROI

### Psychographic Segmentation

Identify the financial motivations driving customer behavior

### Strategy and Planning

Map opportunity across markets, segments, customers and prospects, and geographies.

### Messaging and Content Creation

Deliver Marketing that resonates with each mindset, across hyperpersonalized channels that raise engagement.

**TURN THE WHY  
INTO ROI**



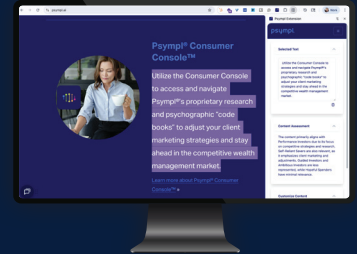
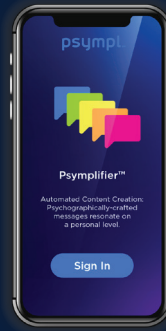
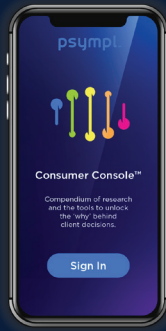
# HOW IS IT ACCOMPLISHED?

Psympl Tool Suite



**MarketMatch**  
FOCUS • MOMENTUM • RESULTS

POWERED BY  
**psympl**



## THE LINE-UP

### Motivation Decoder™

Classify customers based on detailed financial attitudes, motivations and behaviors.

### Consumer Console™

Identify, heat map, and geotarget specific Psympl personas that match your goals. Access deep insights into consumer behaviors.

### AI-Driven Psymplifier™

Multichannel AI automated content creation: Messages resonate on hyperpersonal level.

### Psympl App Extension

In-app Chrome extension to put the power of psychographic insight where you need it – every day.

# BUILT ON THE FOUNDATION OF PSYCHOGRAPHIC SEGMENTATION DATA



# WHAT SEGMENT ARE YOU?

Take the Psympl Motivation Decoder



## Psychographic Mindset Segments That Explain Financial Behavior

17%



### SEGMENT 1: GUIDED MINDSET

*I am financially comfortable and take a hands-off approach with topics related to managing my money. I just want professionals to use a safe and predictable approach.*

22%



### SEGMENT 2: AMBITIOUS MINDSET

*I am financially secure and actively following the stock market. I love to discuss finances, and I favor a more aggressive approach as well as investing in cryptocurrency.*

20%



### SEGMENT 3: PERFORMANCE MINDSET

*I am financially secure and confident in my financial standing and retirement. I prefer a balanced approach to risk, seeking both potential gains and security.*

25%



### SEGMENT 4: HOPEFUL MINDSET

*I am living paycheck to paycheck and worried about my retirement. I avoid investing and often carry credit card debt because of my financial situation.*

16%



### SEGMENT 5: SELF-RELIANT MINDSET

*I am pretty financially secure. I don't invest in or trust the stock market but I'm still on track for retirement. My finances aren't complex, so I prefer to just manage them myself.*

**Gain insight into customers AND prospects  
and put that insight into action!**



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