



Data-Driven Marketing

Find Your Best Customers with Deluxe

Programs developed
specifically for financial
institutions, powered by Deluxe



deluxe⁺
PAYMENTS & DATA

**As industry leaders, we think
a little differently.**

We are a results-oriented, data-driven
marketing agency that connects brands
with the consumer and business
audiences that matter most.



Our Expertise

With over 100 years' experience, Deluxe has been helping enterprises, small businesses and financial institutions deepen customer relationships through trusted, technology-enabled solutions.

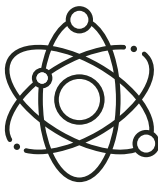
Through the years, we have built a reputation as a company that combines innovation with integrity. As we evolved, we set a goal to build a unique, high-performing marketing agency that is data first, but known for delivering results and full-service campaigns. Today, we are proud to help financial institutions of all shapes and sizes gain the competitive edge they need to grow market share.

We aren't your average marketing agency:



We are your business partner.

We don't view ourselves as another vendor or agency, but as a strategic partner. We design all of our services with your unique business goals in mind.



We provide unparalleled data access.

Our extensively multi-sourced consumer and small business data assets are always evolving. We continually test and onboard new data partners to provide you access to the best data in the market and retire data sources when they don't perform to our high expectations.



We focus on driving results.

Our marketing decisions, from targeting to creative strategy, are rooted in data—from rigorous testing and competitive research to comprehensive analyses of campaign performance metrics.



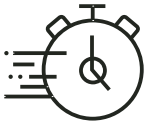
Our Approach

Our history as a trusted, tech-enabled solutions provider laid the foundation for our results-driven process.



Decades of data-driven marketing experience.

- » We manage campaigns for the largest financial institutions in the U.S., including traditional banks, direct banks, credit unions, lenders and FinTechs. Doing so, we are able to deliver hundreds of millions of marketing impressions monthly.
- » We have deep expertise in consumer and business financial products with a strategic focus on profitability and account retention across online and offline channels.



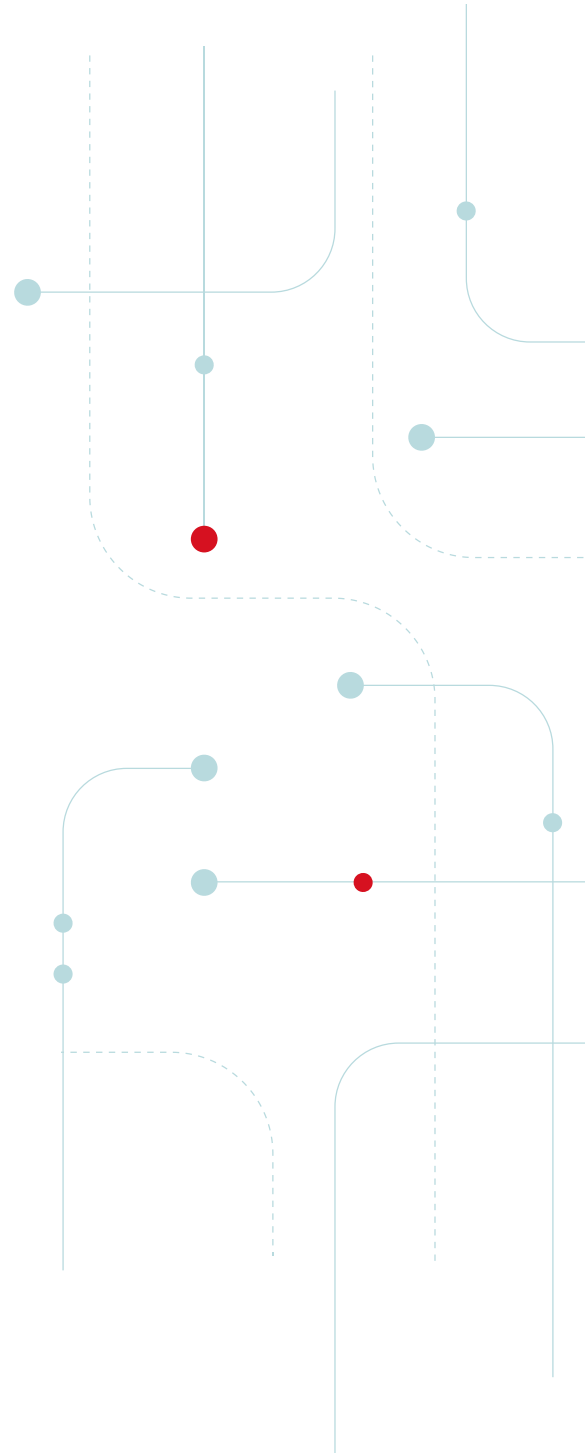
Focused on speed-to-market.

- » Our intake process involves critically thinking through project requests and timing demands to support rapid project planning and actioning.
- » We are nimble, use best practices for efficiency, and adapt to your unique projects and situations as they arise.



Advanced targeting approaches, data libraries, and attributes that are unique in the industry.

- » We develop best-in-class marketing audiences powered by our ever-evolving data assets, our custom-built wealth and spend scores, and our proprietary AI targeting approaches.
- » Our comprehensive coverage of consumer, small business, and trigger-based behavioral data has been recognized and used by companies across verticals.





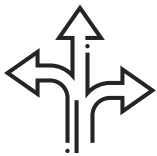
Our People

We bring our client-focused mindset to all of our projects.



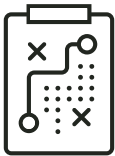
Communicative and responsive

- » We pride ourselves on being a client partner—how, why, and when we communicate are key reasons our clients have been successful.
- » We are clear and thorough in project status updates and deliverable expectations along the way.



Flexible and transparent

- » We offer flexible contracting arrangements and never require channel exclusivity periods.
- » We also offer client-centric pricing models, including traditional and performance-based funding structures.



In-house agency services

- » We have the ability to execute each phase of the campaign lifecycle in-house, from concept development to measurement, which ensures the highest level of quality.
- » We have partnerships with industry-leading platforms and channel partners to deploy across online and offline channels.

We partner with large brands and resellers.

25 of the top 50
U.S. banks, ranked
by branch count

Over 5 decades of
experience working
with banks and
credit unions

Over
1,000 distinct
client/partner
projects delivered
per year



Our Areas of Focus

01

Strategic Campaign Design and Consulting

- Performance forecasting
- Promotion strategies and competitive research
- Program management and planning

02

Data Integration and Audience Selection

- Extensively multi-sourced data assets
- Proprietary predictive scores
- Advanced AI and machine learning-powered targeting and insights

03

Segmentation and Data Management

- Custom next best product models & segmentation builds
- Customer monitoring services for retention
- Data appends and opportunity analytics

04

Creative Strategy and Development

- Digital and UX strategy
- Full studio services, from concepting to asset design
- Messaging optimized for conversion by channel and segment

05

Campaign Production and Deployment

- Cross-channel activation and in-flight optimization
- Media/audience planning and media buying
- Managed print services

06

Attribution and Performance Optimization

- Sophisticated matching algorithms
- Detailed reporting and dashboards
- Profitability projections

We're ready to partner with you today.

DataDrivenMarketing@deluxe.com

877.214.2513

deluxe.com/ddm

