

Attract, Engage, Retain

PMG **360**

Introducing PMG 360 Analytics

Understanding your members so well you can predict and fulfill their unique financial needs!

PMG 360 Analytics is an end-to-end application that offers credit unions the ability to see members in a new way. Leveraging PMG's predictive analytics capability and behavioural segmentation models, you get insight into a member's financial personality and the causal factors that can deepen your relationship with members and drive better business results.

Simply put, we help you understand and deliver more value to your members. PMG 360 Analytics' comprehensive view includes:



Retention and engagement scoring

Uses machine learning to identify and prioritize members most at risk and trigger opportunities with members who exhibit the highest propensity to do more business with you.



Trajectory analysis

Allows you to benchmark and track financial progress for members as they progress through each life stage segment.



Share of investable assets

Provides a snapshot of a member's financial balance sheet and your current share of wallet.



Value of advice and relationship factors

Recommend statistically qualified sets of advice that, when applied, can increase one's financial success and engagement.



Life stage segmentation

Classifies your members into one of 13 financial consumer segments based on financial circumstances and their financial personality.

Why now?



1-in-2

Millennial and Gen Z clients **use multiple financial providers** for both their day-to-day banking and savings/investing.

The opportunity to become primary provider to your clients/prospects **drops around ages 40-45** -- especially as it relates to day-to-day banking. **Winning the business** as their primary provider **by the time they hit their late 30s is imperative.**

Only

3-in-10

financial consumers are **"completely satisfied"** with the degree of support they are receiving from their providers to make them **feel confident in their financial decisions.**



Why PMG Intelligence?

At PMG, we differentiate ourselves through unique data collection and advanced behavioural models. We ask specific questions to understand consumers' financial situation and goals.

Our expertise in data science and behavioral modeling allows us to identify high-propensity actions that improve financial health. With our proprietary life stage model that connects members to financial advice we have successfully solved this complex problem in a user-friendly tool. All of this is organized in advanced dashboards and metrics that facilitate timely and proactive engagement to increase loyalty and drive sales opportunities.

Driving opportunities and benefits for your business

- Identify and prioritize high potential activities with members to increase loyalty and engagement.
- Engage members with timely product and service offers aligned to their financial goals.
- Provide targeted advice to members based on their unique needs and financial personality.
- Provide focus on opportunities to increase share of wallet with existing members.
- Optimize performance of marketing and front-line sales activities and campaigns.

How are users benefiting from PMG 360 Analytics?

"At Mainstreet, our commitment to personalized financial guidance led us to partner with PMG Intelligence for their Life Stage Segmentation. This robust model, embedded in our CRM tool, equips our advisors with valuable insights into member preferences, enabling richer interactions. Thanks to PMG Intelligence, we're better prepared to provide truly customized advice that aligns with our members' goals and dreams, ensuring a superior experience for all."



We're just getting warmed up

We are committed to building on the powerful capabilities of PMG 360 Analytics. Over the next few months, more enhancements to our behavioural segmentation and predictive analytics capabilities are planned. This includes:

- **Next best actions and timing of offers** will provide specific recommendations on which products to offer next based on current product profile and unique needs of your member.
- **Mortgage risk and defection** will identify members who may be at risk of moving their mortgage elsewhere at renewal time.
- **Deep attitudinal and behavioural insights** will be added to our dashboards and provide deeper analysis and insights to your member's profile.

Time to get started!

To learn how PMG 360 Analytics can help you know your members even better and grow your business, contact us at contact@pmgintelligenece.com and book an introductory appointment today!

