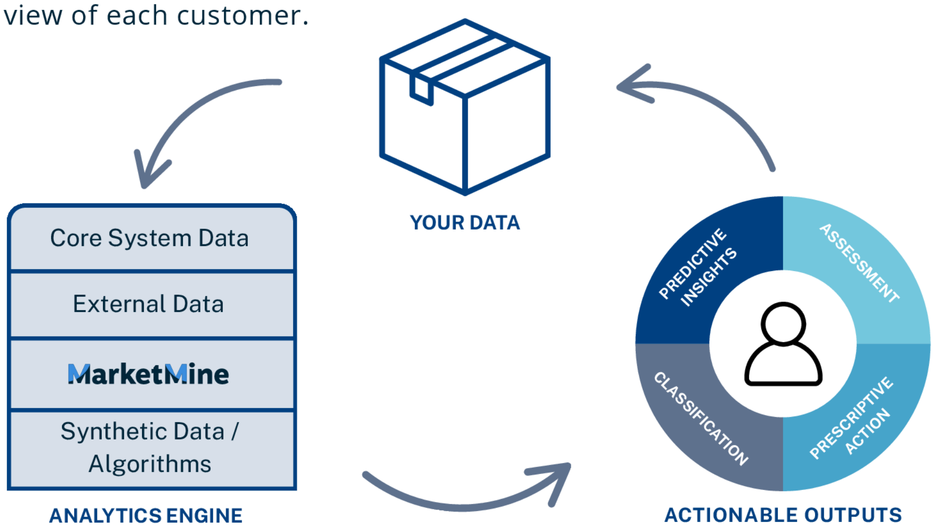
PMG360

PMG360 uses predictive analytics and client behavior insights to help financial institutions boost revenue, deepen client relationships, and improve marketing ROI.

The Complete 360 View

PMG360 integrates primary systems data and broader systems data into a unified platform giving financial institutions a true 360-degree view of each customer.



This enables four powerful insight types:

- **Predictive Insights:** Anticipate client needs and behaviors
- **Assessment:** Track client financial progress and risks
- **Classification:** Group clients by life stage and financial profile
- **Prescriptive Action:** Recommend the best products and advice for each client

With PMG360, you can:

- Identify and prioritize high-potential client activities.
- Deliver timely, personalized offers aligned with member goals
- Increase share of wallet and client engagement
- Optimize marketing and sales campaign performance

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 clients' goals and dreams, ensuring a superior experience for all."

mainstreet CREDIT UNION

On the Horizon

More enhancements to our behavioural segmentation and predictive analytics capabilities are planned with:

- **Acquisition Journey Mapping**
- **Product Performance Metrics**
- **Relationship Depth Scoring**
- **Comparative Analysis**

Why PMG INTELLIGENCE?

At PMG, we combine unique financial and behavioral data with deep expertise in data science and behavioral modeling to deliver precise, actionable insights. We ask specific questions to truly understand consumers' financial situations and goals.

Our proprietary life stage segmentation and advanced models identify high-propensity actions and opportunities that improve financial health and client loyalty. These insights are delivered through a simple, user-friendly tool and intuitive dashboards, empowering advisors to engage proactively, increase retention, and drive sales growth.

PMG360 Outputs *Insights to Drive Growth & Engagement*

CLASSIFICATION

Life stage segmentation
Classifies clients into 1 of 18 financial segments based on their circumstances and personality, enabling targeted marketing for specific use cases.

Share of investable assets
Offers a snapshot of a client's balance sheet and their current share of investible assets (deposits).

PREDICTIVE INSIGHTS

Liquid Asset Prediction
Estimates a member's liquid assets, regardless of relationship depth, and categorizes them into actionable ranges aligned with the Credit Union's delivery strategy (e.g., $0–50K to advisors, $250K+ to private wealth).

Customer Lifetime Value
Uses 3 advanced models and standard (customizable) cost structures to assess current and forecasted profitability—annually and over 5 years—per member. Gives marketing and operations clear insight into their impact on the bottom line.

ASSESSMENT

Trajectory analysis
Enables benchmarking and tracking of clients' financial progress through life stages, identifying those on the verge of entering or leaving a segment.

Retention and engagement scoring
Identifies high-risk clients and those most likely to expand their relationship, helping marketing and operations target messaging to boost retention and growth.

PRESCRIPTIVE ACTION

Value of advice and relationship factors
Based on PMG's Value of Advice research, recommends statistically backed advice to boost financial success and engagement.

Next Best Product
Uses client and proprietary data to find similar members by life stage, product mix, and usage—offering product suggestions to deepen engagement.

Got Questions? contact@pmgintelligence.com www.pmgintelligence.com PMG Intelligence