

# Multi-Loan Pre-Approval Loan Customer Experience Journey

Engagement  
Financial

Hello Lia,  
Take a look at these pre-approved loan offers just for you!

Lia receives pre-approved offers for **multiple loan types\*** frequently by email, direct mail, and in online and mobile banking

**Personalized, Highly Relevant, Timely Offers**



1

2



Lia is reminded of the offers when she logs into her account and **by the teller when she visits a branch**

**Reinforces Offers and puts them at their finger tips**



Lia has an unexpected expense and **remembers the pre-approved offers** she has received

Lia **decides to accept** the loan on her device, confirms the terms, and the loan officer contacts her to close the loan

**Streamlines**

**wherever they are 24/7**

Lia's loan is funded and she feels like her financial institution **appreciates her and is ready to meet her needs**

4



\*For Auto Loans, Home Equity Loans, Personal Loans, Credit Cards and more



Learn how Multi-Loan Pre-Approval can help you deliver a best-in-class customer experience and exceed loan marketing goals.

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