

Trigger-Based Loan Acquisition Customer Experience Journey



Lia is shopping for a mortgage* and undergoes a credit check

Lia receives a phone call and an email with the **pre-selected offer** the next day



Engagement
Financial

Hello Lia, Did you know you're **pre-selected for a mortgage** up to \$350k?

Personalized,
Highly Relevant, Timely Offer

The same offer arrives via direct mail a few days later

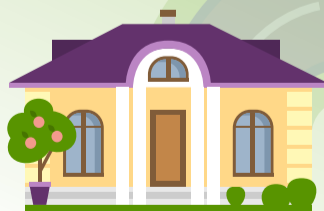


Reinforces Offer



Lia **accepts the loan offer** and completes the mortgage application

Lia's mortgage is funded and she feels her financial institution **understands and anticipates her needs**



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



Learn how Trigger-Based Loan Acquisition can help improve your loan retention and deliver a best-in-class customer experience.

call 1.800.351.3843
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