Geezeo®
Engagement Banking

Marketing Platform Guide

A step-by-step best practices guide for reporting in Geezeo Admin

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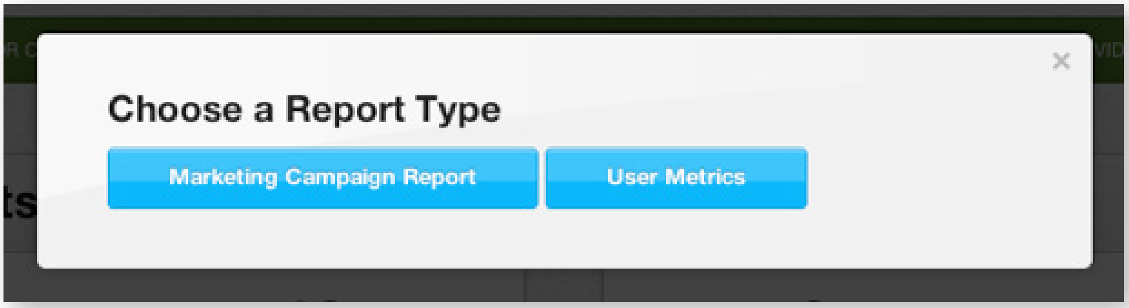
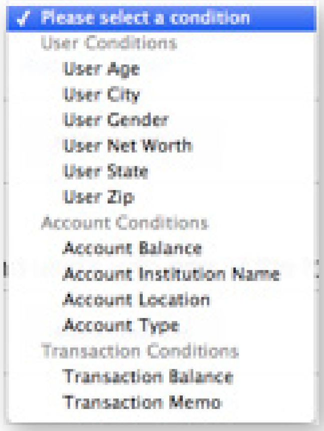
Creating a Marketing Report

Choose Report from admin menu.
Choose Marketing Campaign Report from the two options.



When running a marketing campaign report you can segment users whom you want to target with specific offers. Using the following form will create a report containing the matching users of the criteria you input. To target all of your users, you can run a default report using no criteria such as in the form below.



In marketing campaign reports we offer three different types of conditions:

1. User Conditions
2. Account Conditions
3. Transaction Conditions

All of the criteria you can target users by are shown in the image on the left.

Examples of Reports You Can Run in Geezeo Marketing Platform

All PFM Users

To target all PFM users.

Create report with no filters.

Auto Loan Targeting
(Deposit Accounts over $1500 & No Auto Loan)

Find users with Checking, Savings & Investment accounts with balances over $1,500 and do not have a auto loan with you:

Add a condition under "Find users with all of the following conditions"
Select "Account Type," "Does not have" & "Auto"

Add a condition under "Find users with any of the following conditions"
Select "Account Type," "Is" & "Checking"

Add a Subfilter
Select "Account Balance," "Is greater than" and "1500"

Add another condition under "Find users with any of the following conditions"
Select "Account Type," "Is" & "Savings"

Add a Subfilter
Select "Account Balance," "Is greater than" and "1500"

Add another condition under "Find users with any of the following conditions"
Select "Account Type," "Is" & "Investment"
Select "Account Balance," "Is greater than" and "1500"
Click the blue **"Run this report"** button on the button of the page

Auto Targeting
(External Held Auto Loan)

Find users with Checking, Savings & Investment accounts with balances over $1,500 and do not have a auto loan with you.

Add a condition under "Find users with all of the following conditions"
Select "Account Location," "is" & "External"

Add a Subfilter
Select "Account Type," "Is" and "Auto"
Click the blue **"Run this report"** button on the button of the page

Credit Card Targeting
(Externally Held Credit Cards)

Find users who hold credit cards externally.

Add a condition under "Find users with all of the following conditions"
Select "Account Type" "Is" & "Card"

Add a Subfilter
Select "Account Location," "Is" and "Cashedge"
Click the blue **"Run this report"** button on the button of the page

Credit Card Targeting
(Deposit Accounts over $2500 & No Credit Card)

Find users with Checking, Savings & Investment accounts with balances over $5,000 and do not have a credit card in the PFM.

Add a condition under "Find users with all of the following conditions"
Select "Account Type," "Does not have" & "Card"

Add a condition under "Find users with any of the following conditions"
Select "Account Type," "Is" & "Checking"

Add a Subfilter
Select "Account Balance," "Is greater than" and "2500"

Add another condition under "Find users with any of the following conditions"
Select "Account Type," "Is" & "Savings"

Add a Subfilter
Select "Account Balance," "Is greater than" and "2500"

Add another condition under "Find users with any of the following conditions"
Select "Account Type," "Is" & "Investment"
Select "Account Balance," "Is greater than" and "2500"
Click the blue **"Run this report"** button on the button of the page

Mortgage Targeting
(Externally Held Mortgages)

Find users who hold mortgages externally.

Add a condition under "Find users with all of the following conditions"
Select "Account Type" "Is" & "Mortgage"

Add a Subfilter
Select "Account Location," "Is" and "External"
Click the blue **"Run this report"** button on the button of the page

Mortgage Targeting
(Deposit Accounts over $10000 & No Mortgage Account)

Find users with Checking, Savings & Investment accounts with balances over $15,000 and do not have a mortgage.

Add a condition under "Find users with all of the following conditions"
Select "Account Type," "Does not have" & "Mortgage"

Add a condition under "Find users with any of the following conditions"
Select "Account Type," "Is" & "Checking"

Add a Subfilter
Select "Account Balance," "Is greater than" and "10000"

Add another condition under "Find users with any of the following conditions"
Select "Account Type," "Is" & "Savings"

Add a Subfilter
Select "Account Balance," "Is greater than" and "10000"

Add another condition under "Find users with any of the following conditions"
Select "Account Type," "Is" & "Investment"
Select "Account Balance," "Is greater than" and "10000"
Click the blue **"Run this report"** button on the button of the page

Home Equity Targeting
(Internal & External Mortgage Accounts)

Find users who hold mortgages internally and externally.

Add a condition under "Find users with all of the following conditions"
Select "Account Type" "Is" & "Mortgage"
Click the blue **"Run this report"** button on the button of the page

No External Accounts

To find users with no aggregated accounts.

Add a condition under "Find users with all of the following conditions"
Select "Account Location," "Is not " & "External"
Click the blue **"Run this report"** button on the button of the page

Any External Accounts

To find users with no aggregated accounts.

Add a condition under "Find users with all of the following conditions"
Select "Account Location," "Is" & "External"
Click the blue **"Run this report"** button on the button of the page

Investments
(External Deposit Accounts over $15000)

Find users with external Checking, Savings & Investment accounts with balances over $15,000.

Add a condition under "Find users with any of the following conditions"
Select "Account Type," "Is" & "Checking"

Add a Subfilter
Select "Account Balance," "Is greater than" and "15000"

Add a Subfilter
Select "Account Location," "Is" and "External"
Add another condition under "Find users with any of the following conditions"
Select "Account Type," "Is" & "Savings"

Add a Subfilter
Select "Account Balance," "Is greater than" and "15000"

Add a Subfilter
Select "Account Location," "Is" and "External"
Select "Account Type," "Is" & "Investment"

Add a Subfilter
Select "Account Balance," "Is greater than" and "15000"

Add a Subfilter
Select "Account Location," "Is" and "External"
Click the blue **"Run this report"** button on the button of the page

Investments
(Deposit Accounts over $15000 & No IRA)

Find users with Checking, Savings & Investment accounts with balances over $15,000 and do not have an existing IRA.

Add a condition under "Find users with all of the following conditions"
Select "Account Type," "Does not have" & "Investment"

Add a condition under "Find users with any of the following conditions"
Select "Account Type," "Is" & "Checking"

Add a Subfilter
Select "Account Balance," "Is greater than" and "15000"

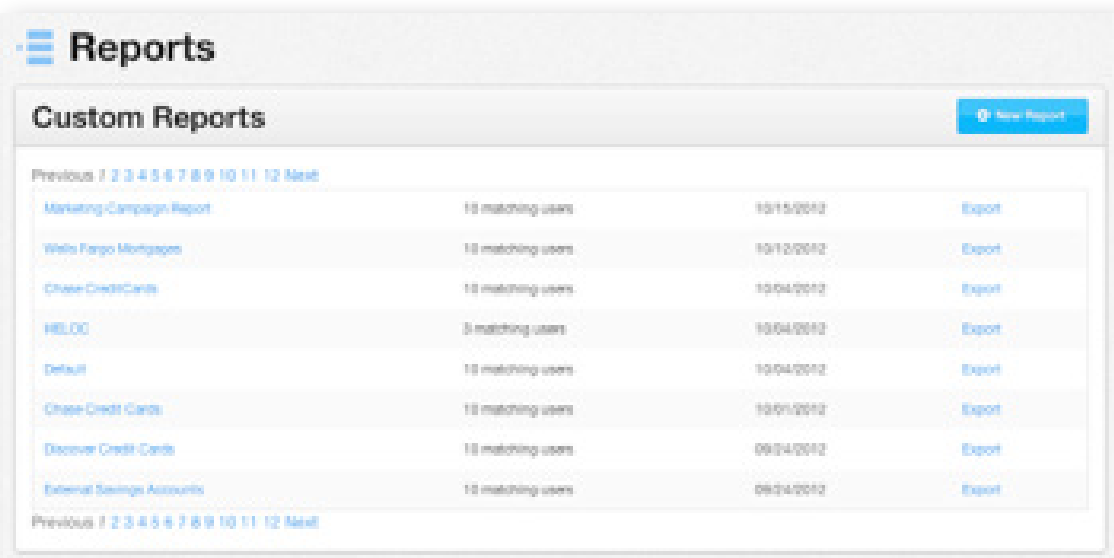
Add another condition under "Find users with any of the following conditions"
Select "Account Type," "Is" & "Savings"

Add a Subfilter
Select "Account Balance," "Is greater than" and "15000"

Add another condition under "Find users with any of the following conditions"
Select "Account Type," "Is" & "Investment"
Select "Account Balance," "Is greater than" and "15000"
Click the blue **"Run this report"** button on the button of the page

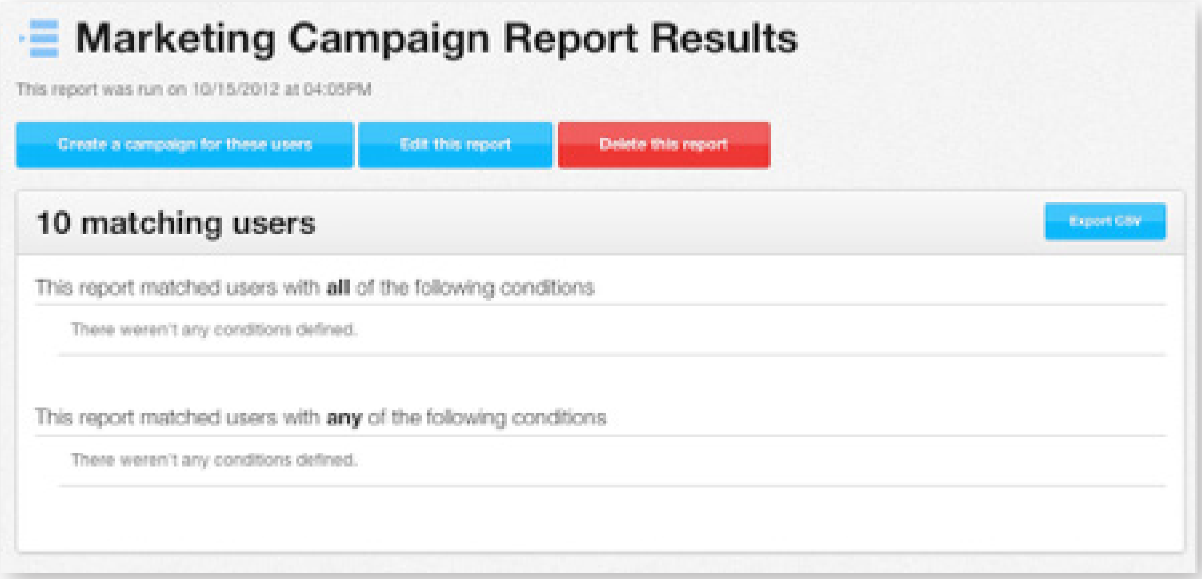
Viewing Reports

Within the reporting section, you can view, edit and export old reports or create new ones. You will also be able to see how many users each report matches in real time.



Editing or Deleting a Report

Click on the name of the report to make changes to the report such as on the following screen.

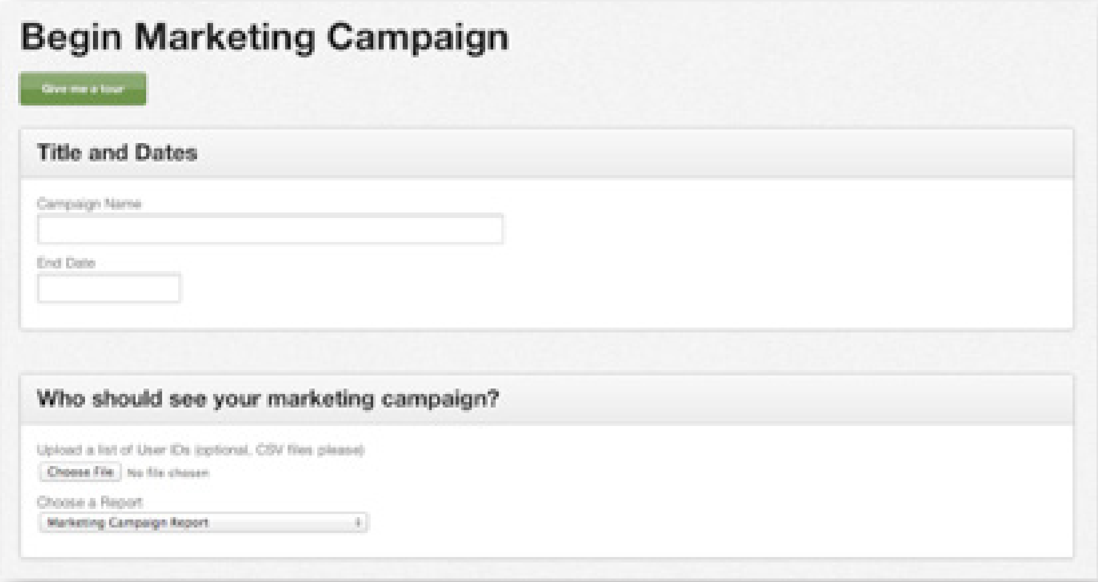


From here you can:

1. Create a campaign for these users
2. Edit this report
3. Delete this report
4. Export CSV

Start a Marketing Campaign

When starting a marketing campaign it is easiest to create the campaign directly from a report within Geezeo Admin. This automatically connects the campaign to the report and the users who are being targeted.



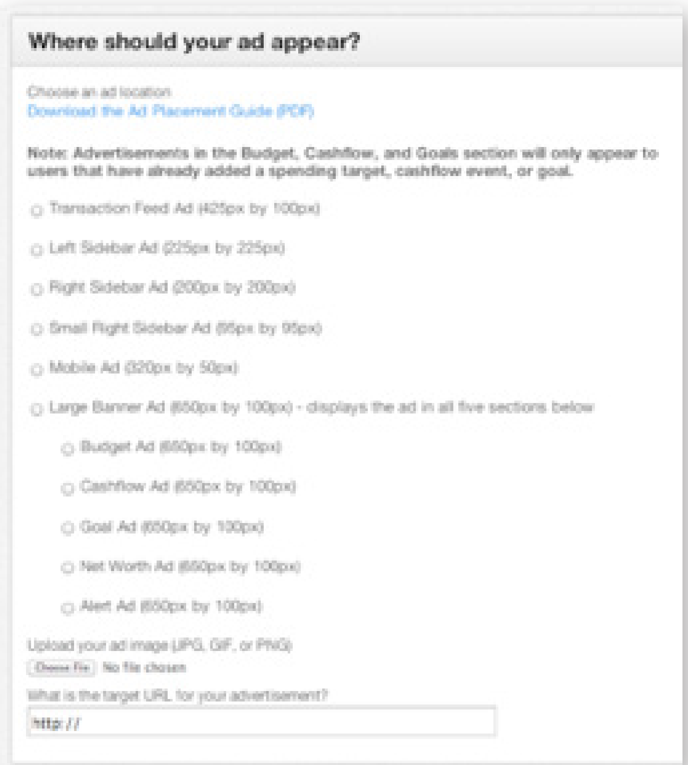
A marketing campaign name will help you identify the campaign you are running as well as keep track of the real-time statistics seen in the marketing section of Geezeo Admin.

By selecting an end date for the campaign, you will be ensuring the campaign ends after a specific date. Therefore, an ad designated for October with an end date of 10/31 will no longer be viewed by its targeted user base on November 1st.

After selecting an end date, if you have created the campaign directly from a report, the "Who should see your marketing campaign?" section will already contain the necessary data. If you haven't, you can select an old report or upload your own spreadsheet of user IDs to target.

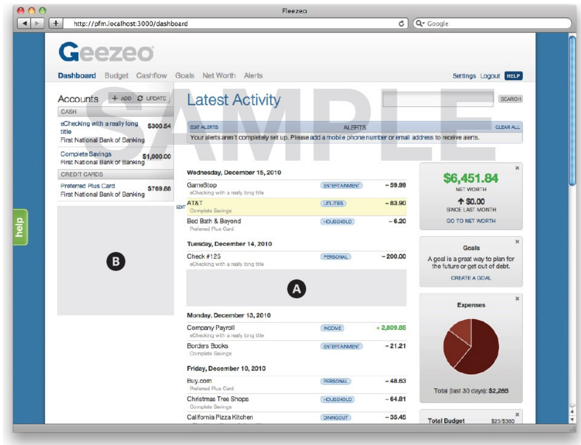
Ad Placement

Next, you will be able to choose where to place your advertisement within the PFM. An Ad Placement Guide is included within Geezeo Admin for your convenience. We have also included all the specifics for size and format of advertisements in order for you to create and use your own ads.



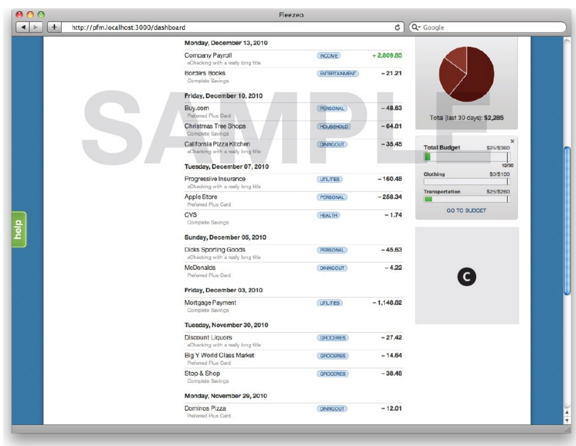
You will then be prompted to upload the advertisement. This ad will be shown to all targeted users in the section of PFM that you indicate.

Lastly, you can insert a target URL for the advertisement. The target URL is the page where the user is directed to when they click the ad. For example, if you are advertising auto loans, use the URL of the auto loan page of your website as the target URL.

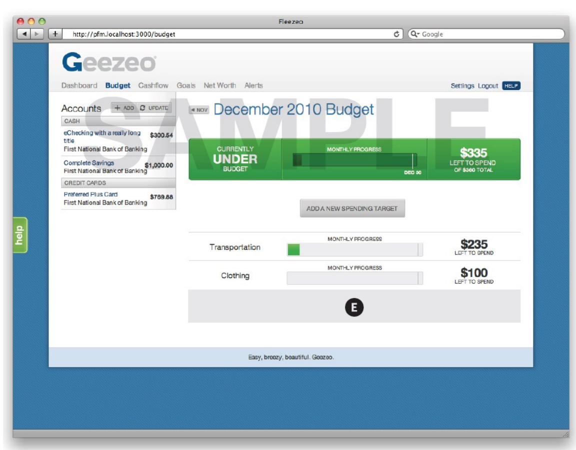


A Feed Ad (425 x 100 px)

B Left Sidebar Ad (225 x 225 px)



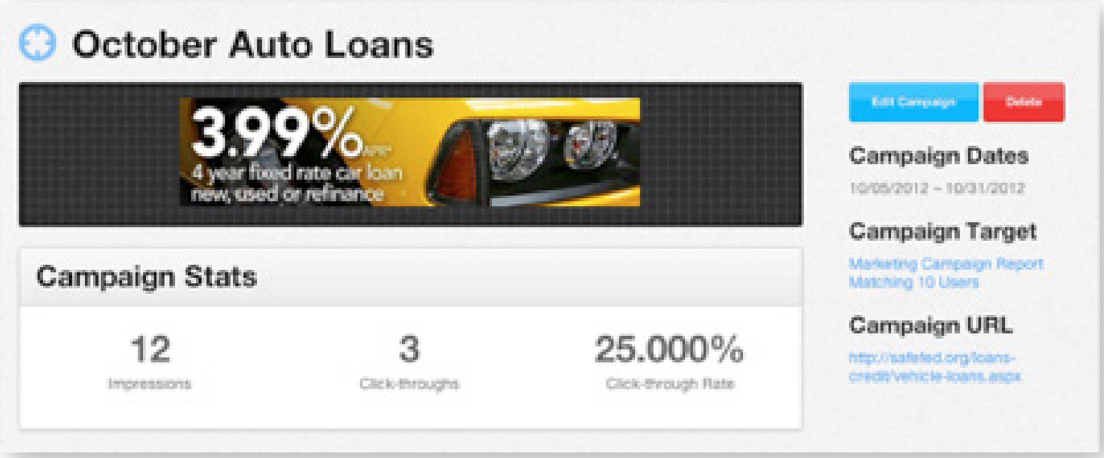
C Right Sidebar Ad (200 x 200 px)



E Banner Ad (650 x 100 px) all tabs other than Dashboard and Retirement

Ad Placement continued

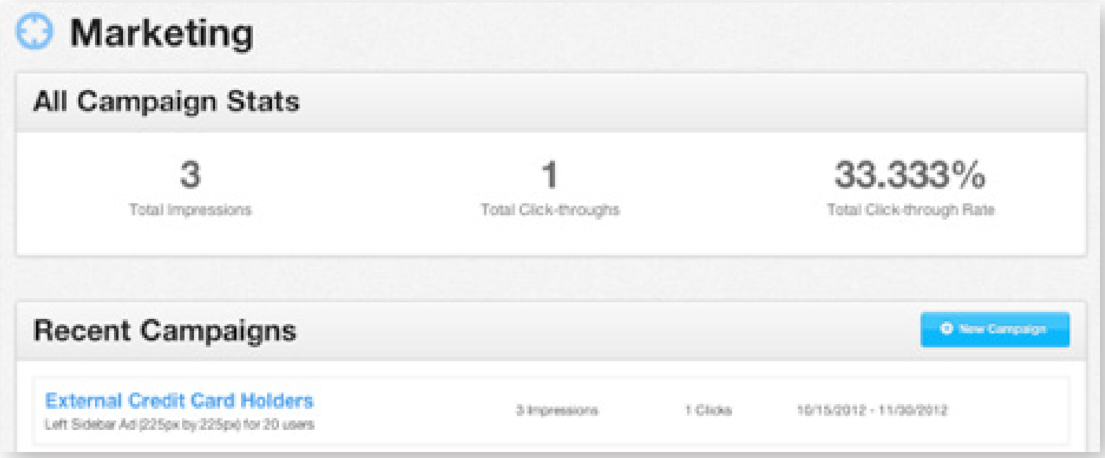
Once you submit the campaign, you will be directed to a campaign summary like the one shown below.



On this screen you can make edits to the campaign as well as see the campaign highlights and real time statistics including number of impressions and number of click-throughs.

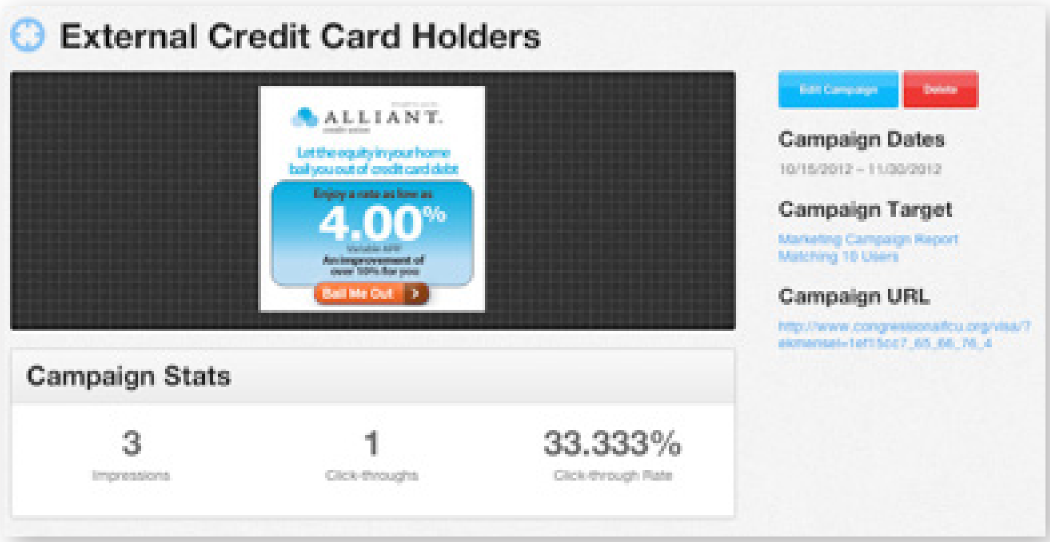
Viewing Marketing Campaigns

In the marketing tab seen below, you can view your overall, real-time marketing statistics as well as your specific campaign statistics. You can also view all your campaigns and edit or delete campaigns from this area.



Viewing Marketing Campaigns continued

By clicking on a marketing campaign you can view its specifics, like in the image below:



From this screen you can edit or delete the campaign, see all campaign statistics, and all relevant details: the campaign's running time, the report used for targeting users, and the URL where the ad is directed.

You're not alone - we can help!

Our Client Success & Marketing teams are dedicated to your success.