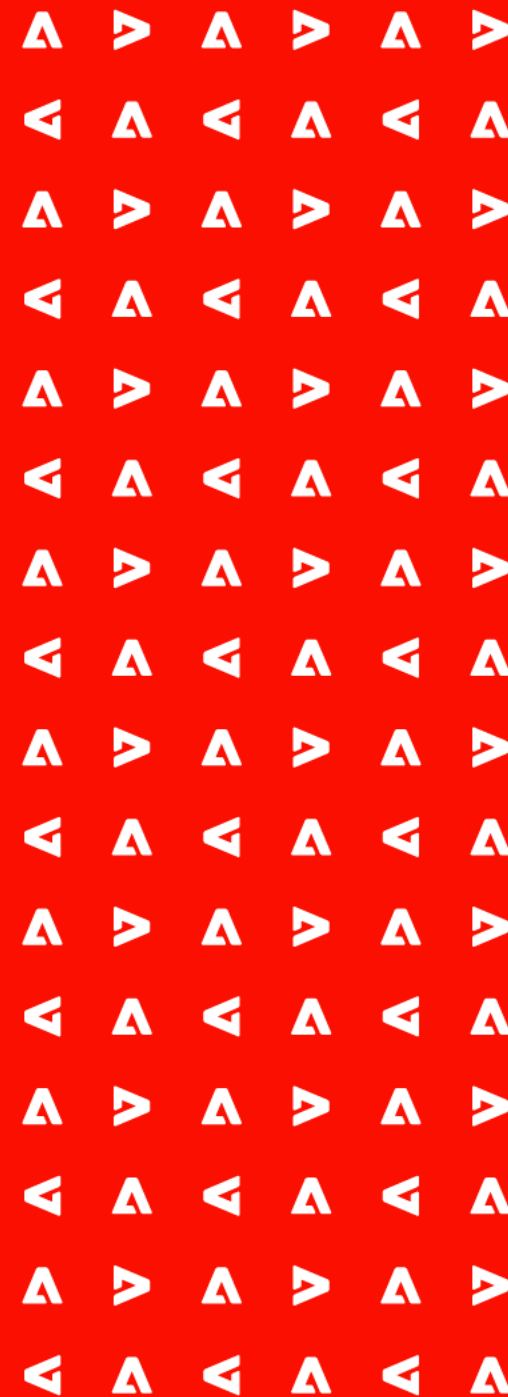




# SecurFinance:

## Dynamic cross-channel on-boarding

Radim Sevcik | Partner Solution Consultant, Adobe  
July 2022



# Agenda

## Desired Outcomes

1

### **Identify your objectives & pain points**

Use the conversation as an opportunity to learn about, validate, and document what outcomes are most important to the customer and write down discovery questions

2

### **Share Adobe's vision and qualify the customer's interest**

Educate customer by providing an introductory solution overview. This is not intended to be a product deep dive, but a high-level pitch to qualify the customer's interest

3

### **Present a hypothesis on how Adobe and show the demo**

Have a position on what the customer should do (solutions, use cases, tactics) to realize their objectives.

4

### **Align on clear next steps to progress the opportunity**

End meeting by agreeing on tangible next steps ("how Adobe can partner") such as a full demo, deeper discovery, technical case development, etc.

# Discovery Conversation



1. Onboarding is complex and form intensive

2. Communications are static



**Would you  
help us  
understand...**

	Questions
1.	What are your most important channels?
2..	What are the current obstacles in the onboarding process?
3.	What are your KPIs for evaluating the customer onboarding?
4.	What would be your ideal state of customer onboarding?

# Our understanding of your challenges



## Challenges

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- On-boarding can be complex and form intensive for loans or investments
- Communications are static and doesn't adjust to changes in customer context



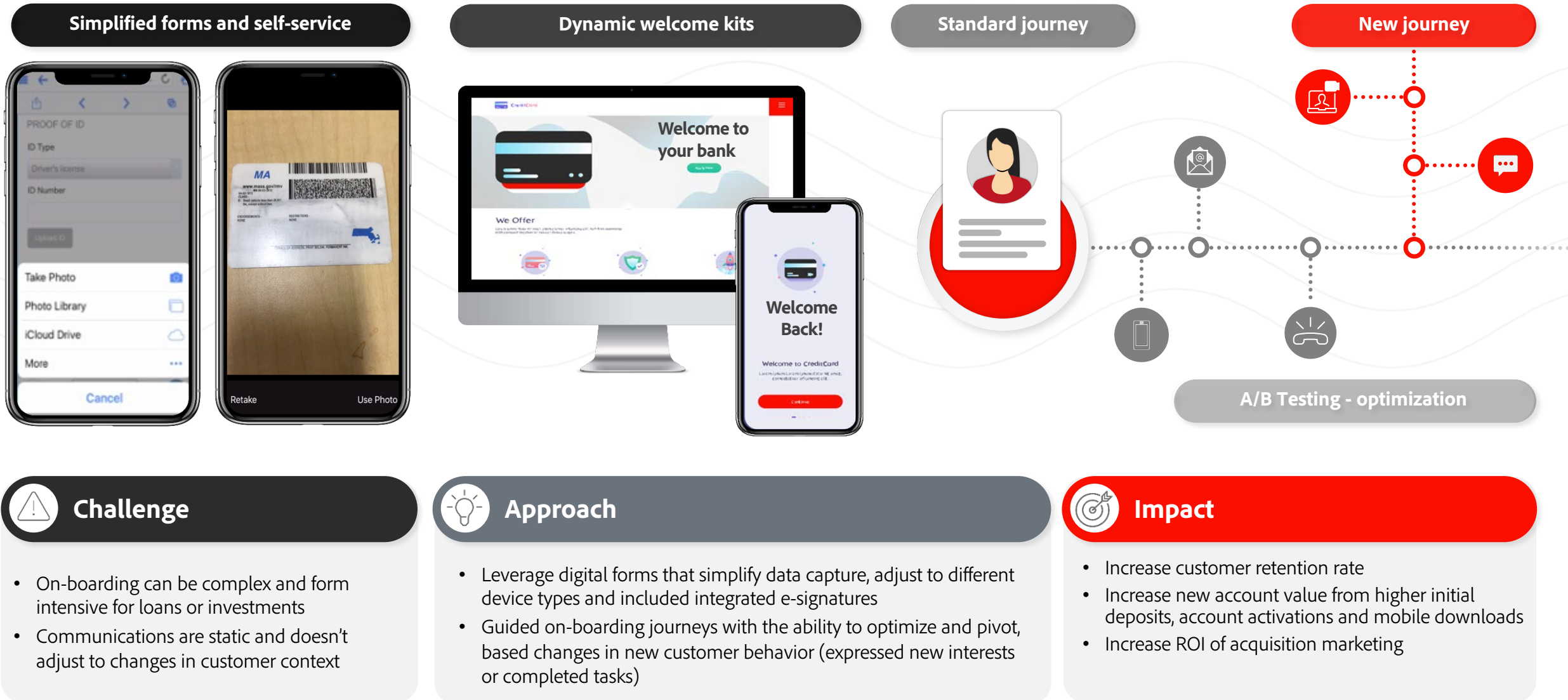
## Business Impact

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- Disjointed experiences, ineffective at driving deeper funnel engagement and conversion
- Poor personalization, leading to missed revenue

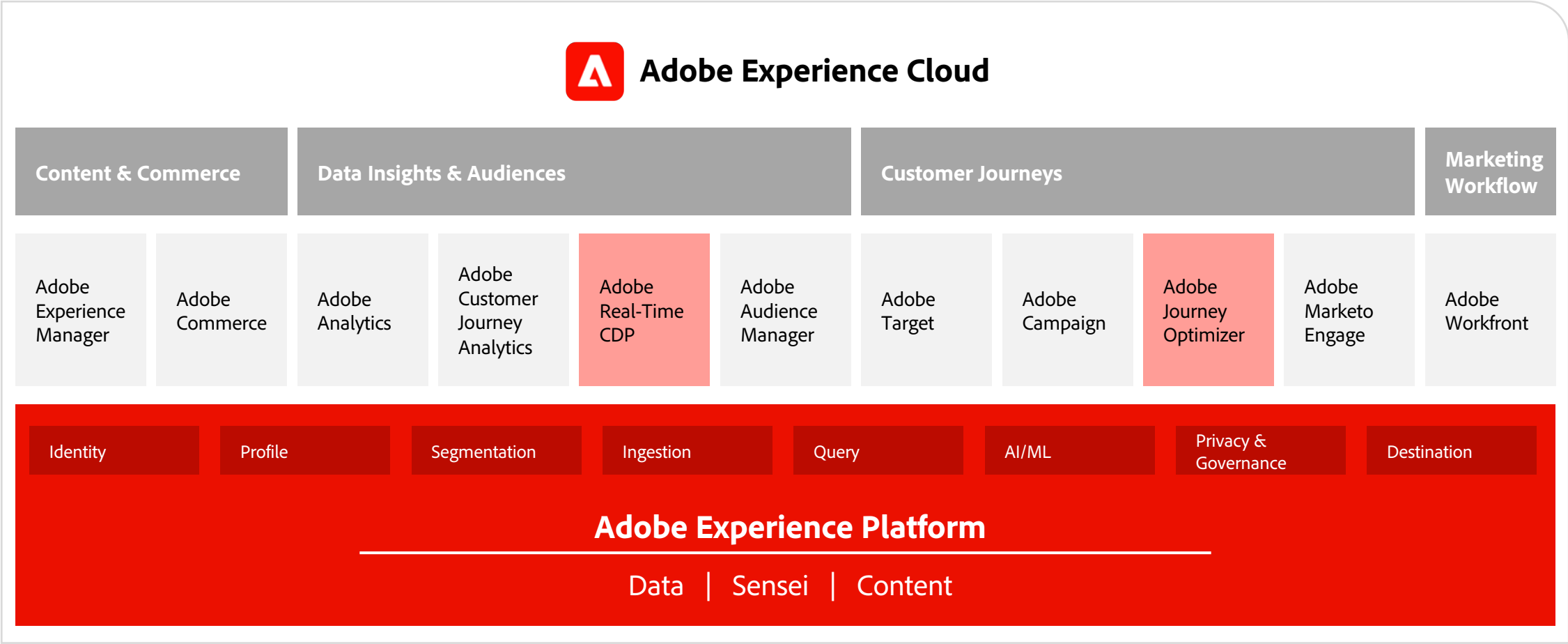
# Dynamic cross-channel on-boarding

How it works: Increase initial customer engagement and retention rates with digital forms and optimized journeys



# Adobe Experience Platform:

## A Next-Generation Platform for Real-Time Analysis & Actionable Profiles



## Demo Showcase



TODAY & TOMORROW

# Fully Digital Experience Exclusive Mortgage Offers

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## Popular offers and services

