

Account Statements with Customized Messages Create Leads, Boost Sales and Improve Customer Satisfaction

“Look at a company like Citigroup that wants to increase its customer base by a huge percentage over the next 10 years. In order to get there, they’re going to have to cross-sell and upsell their services. And any company, if they want to grow their customer base, is going to have to start looking at their documents as real estate, because they are your real estate.” Michael Charest, Exstream software, Pepper & Rodgers 1:1 newsletter

Account statements are the most important link between you and your customers. Leverage the time that they spend reviewing the statement (eyeball time) and create warm leads by placing easy-to-understand and relevant offers on the body of the statement. We’ll show you how to put this valuable real estate to work for you.

Data + Relevance Turn Your Statements and Invoices into a Sales Vehicle

Use the available white space on statements as a marketing tool. Marketing efforts can be customized down to the individual recipient level, offering unprecedented levels of cross-sell and upsell opportunities. Our ability to manipulate your database by flagging certain data elements allows us to target specific account holders with offers that are most likely to be meaningful. Instead of printing the same offer on everyone’s statement, each recipient is offered only the product or service that is relevant to them. Countless different messages can be conveyed to any number of individuals - all in the same print run.



Save Money and Increase Customer Satisfaction by Improving Readability

Improving the readability of statements cuts down on expensive customer support services and helps increase customer satisfaction. Calculated use of space, color and graphics are just a few of the ways we can improve readability.

Impress Your Stakeholders with a Package that is Personal and Substantial

Banks and institutions that send their stakeholders important wealth management, 401K and other benefits statements will appreciate the ease with which we can dramatically improve the customer experience. We’ll take the individual’s data and dress it up, with colorful, easy to read charts. We’ll complement your logo colors throughout, reinforcing your brand. We’ll personalize it for the recipient, and even include a customized newsletter. And we’ll package it with wrappers that make it easy to file and hard to lose.



Leverage your data to expand your Direct Marketing efforts.

Statements and financial documents are essentially “customer communications” documents. We’ll work with your various departments to coordinate your statement requirements along with your marketing needs, to improve all of your stakeholder communications.

We’ll make your data work harder for you

Generally, financial files are loaded with data that we can extract or make use of to create highly relevant, targeted offers for new products and services. For instance, when we run a statement file, we can extract certain types of account holders, flag those customers, create a database and conduct a direct mail campaign on that new list to upsell your new product.

Make Your Statements Work Harder for You

What if marketing wants to give specific account holders with a certain balance a great new offer? Using selective messaging, those account statements only will receive this offer. And selective inserting allows you to stuff an insert into those statements, all in the same run. To make it even more effective, we can conduct a follow up mail campaign to reinforce the offer and a call-to-action.

Create New Prospect Data

Look for a vendor who can not only help you clean up and refresh your existing, but one who offers you innovative ideas for improving your data capture methods. Opt-in campaigns, customer surveys and incentives have all been used very successfully to beef up flimsy databases and give you more insight into your consumers buying preferences. Or if you’re

approaching a new market, we can create your initial prospect list using zipcode and demographics, and launch a follow up campaign designed to capture additional information about your “warm” prospects.

Security

When you handle as much customer data as we do, security is important. Primadata is SAS-70 certified and HIPAA compliant, meaning we maintain the high security standards necessary for the handling and processing of your confidential customer information. You can rest assured that your data will be handled professionally and carefully when you choose Primadata for your variable data work. We specialize in financial statement processing, check processing, insurance claims and benefits processing.

End-to-End Services

We can handle your project from a roll of paper (forms and cut sheet) to the mailbox. We print, process, personalize, stuff inserts, apply postage, mail and supply reports. That is the Primadata difference!

