

Take back the primary relationship

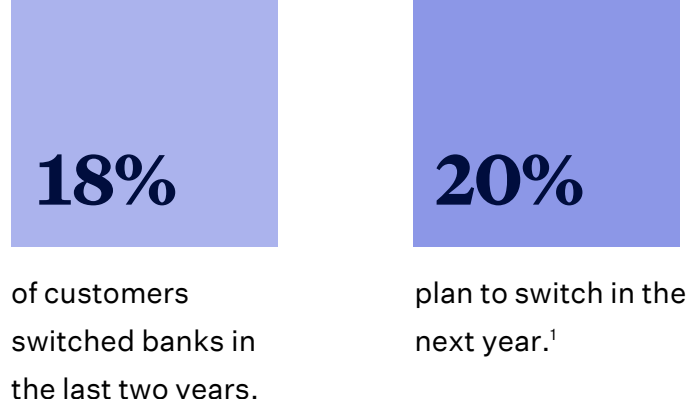
Four forward-thinking ideas to revitalize your tried-and-true customer relationships

Thanks to competition from digitally-advanced incumbent and challenger banks, customers know they have options, putting your primary relationships at risk. Discover how you can protect and expand the primary relationship for the digital age.

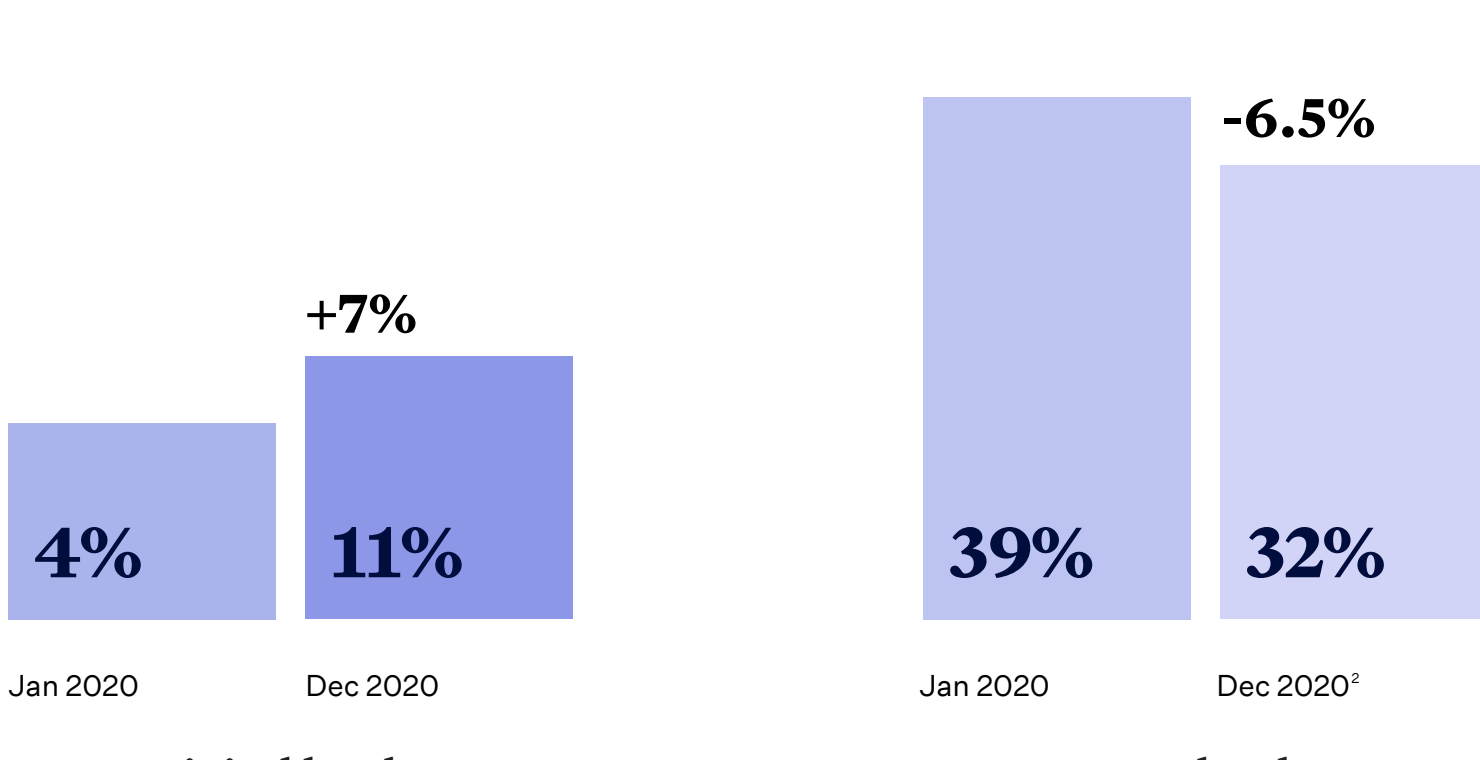
The primary relationship is at risk

Customers shopping for financial products are armed with a wealth of information, while digitally advanced banks are leveraging insights and technologies to engage them. Customers demand digital experiences that are fast, easy, and efficient — and will switch banks to get them.

More people are switching banks



Challenger banks grow share of primary customers while megabanks' share declines



What's behind the shift?

What factors lead customers to switch?³



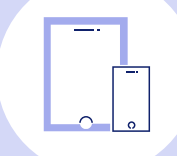
Data protection



Prices and fees



Online banking capabilities



Mobile banking capabilities

Blend's unified Digital Lending Platform can propel you to deliver the superior experiences customers demand — and power your primary relationships for the digital age.

Blend's four-pronged approach to cultivating primary relationships

1

Deliver smart servicing and experiences

Consistency is key. Deliver dependable, out-of-the-box interactions across end-to-end digital journeys with Blend by:

Building trust with a suite of product solutions



Deposit accounts



Credit cards



Personal loans



Mortgage

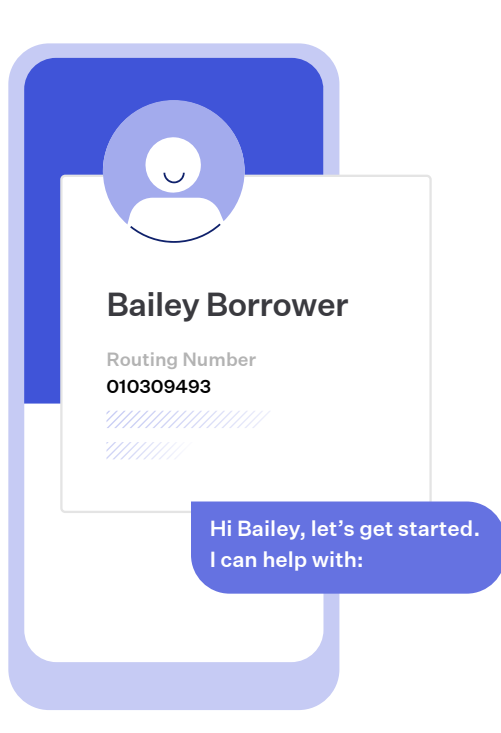


Vehicle loans



Home equity

Building loyalty with low-friction customer journeys



- Intuitive interface
- Responsive design
- Real-time assistance
- Click-to-call customer service

2

Anticipate and serve individual customer needs

Support customers at every financial milestone. Adopt a personalized, dynamic cross-selling approach that meets customers' unique needs in the moment. With Blend Cross-sell, you can:

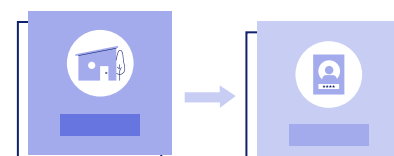
Build relationships with customized offers



Gain customer insights to inform meaningful recommendations.



Present opportunities and offers within the application.



Enable customers to claim cross-sell offers in just a few clicks.

3

Ensure a connected omnichannel experience

Keep track of your customers' journeys. Continue serving customers at each stage and never have customers fall through the cracks by using a strategy that:

Builds confidence with interconnected services

- Allow customers to move between channels without losing progress
- Enable customers to save progress and easily continue later

Builds value with informative views of customer interactions

- See application completion rates and reduce points of friction
- Find out which products customers are interested in
- Utilize insights to optimize new customer outreach and deepen existing relationships

4

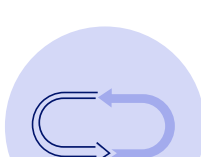
Enable market responsiveness

Fast movers get and keep customers. With Blend's agile technology, implement changes and enhancements to offer the innovative solutions customers want. Here's how:

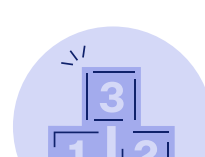
Build strategic opportunities to meet — and exceed — market demand



Get enterprise-level support for new products and advancements.



Create personalized workflows to guide customers.



Leverage modular technology to rapidly bring products to market.

Delivering meaningful digital engagement is the foundation for primary relationships, now and in the future. Blend helps you keep primary customers and win new ones in the digital age.

Find more details in our ebook:
Building primary banking relationships through digital engagement.

[Read the full ebook](#)

Sources

1. Morning Consult, 2021
2. Forbes, 2021
3. Morning Consult, 2021