

Cross-sell deposits directly in the mortgage application

A seamless experience for converting new deposits

Are you delivering *excellent* digital customer service? If you said yes, then you're part of the top 4% of FI leaders who reported the same.¹ But in case you're part of the other 96%, here's a simple and seamless way to convert more deposit accounts, meet membership requirements, and deepen relationships during moments of engagement.

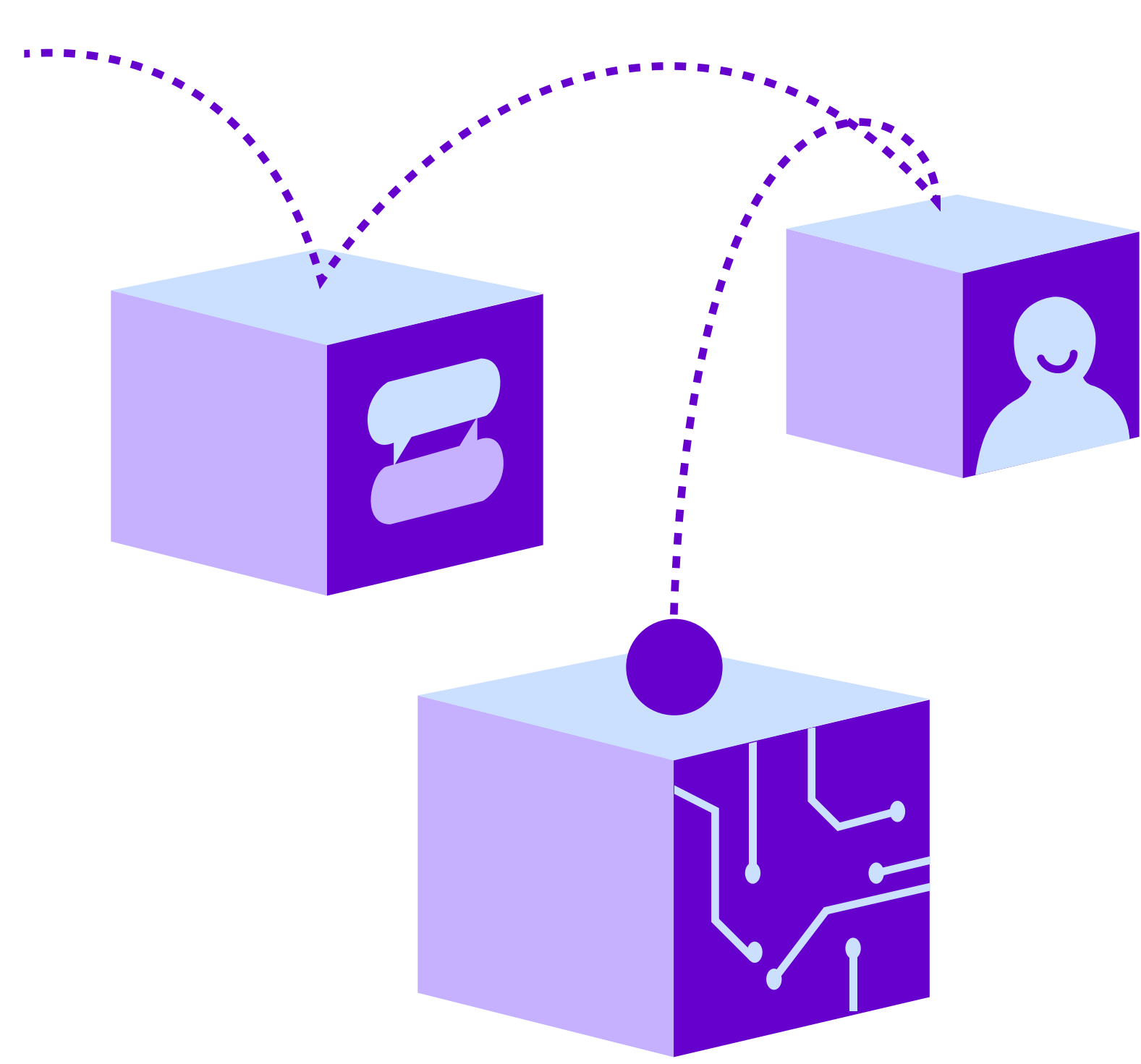
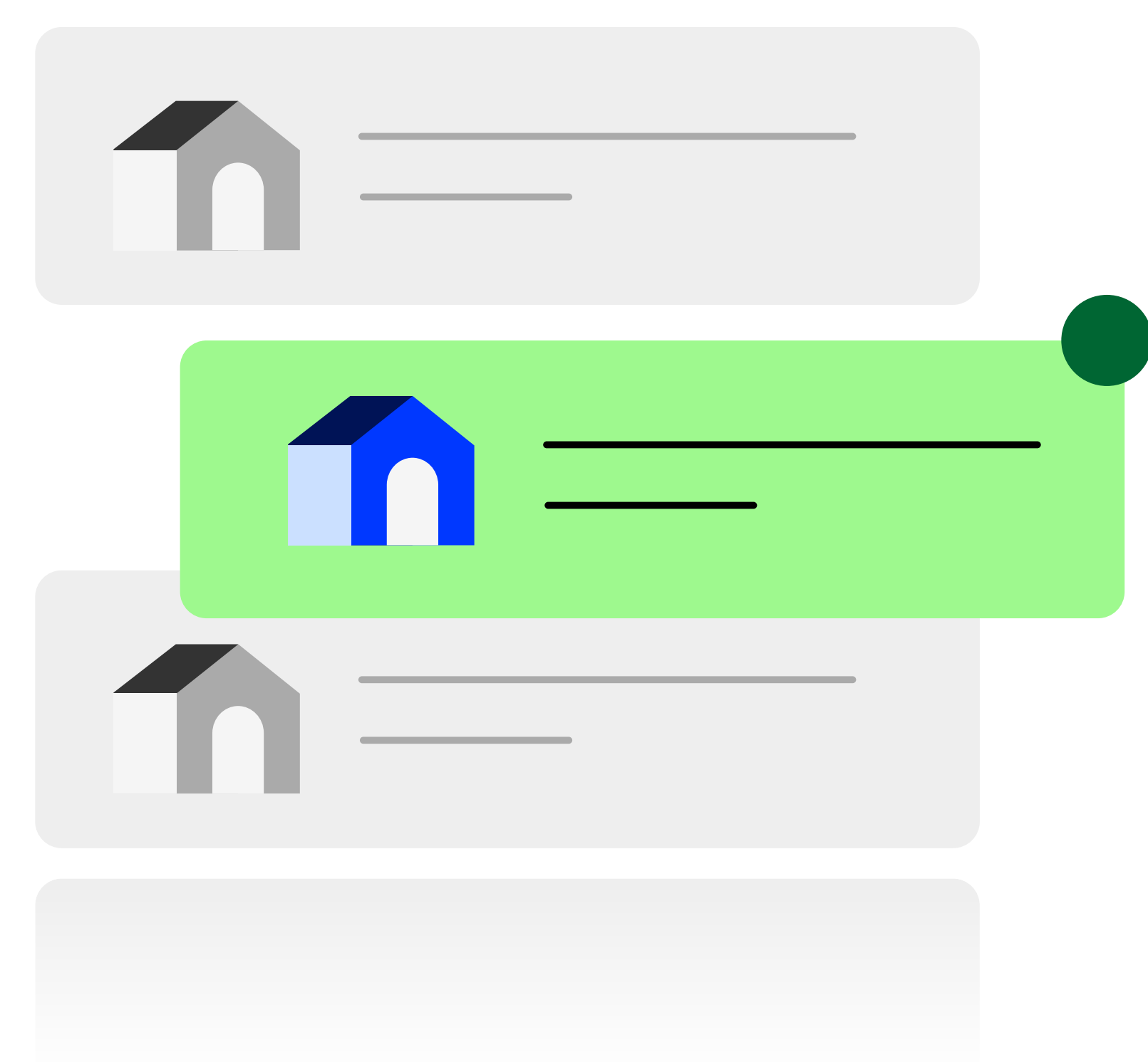
The biggest customer experience gaps include personalized targeting, omnichannel engagement, account opening, and onboarding — success in these four areas will determine the success of your financial institution. Here's how Blend helps.

Four benefits of Blend's Mortgage to Deposits Cross-Sell

1

Present targeted, tailored deposit account offers or membership requirements inside the mortgage application

- Only show offers to new customers with pre-filled mortgage application information.
- No more closing delays because of missing membership requirements.



2

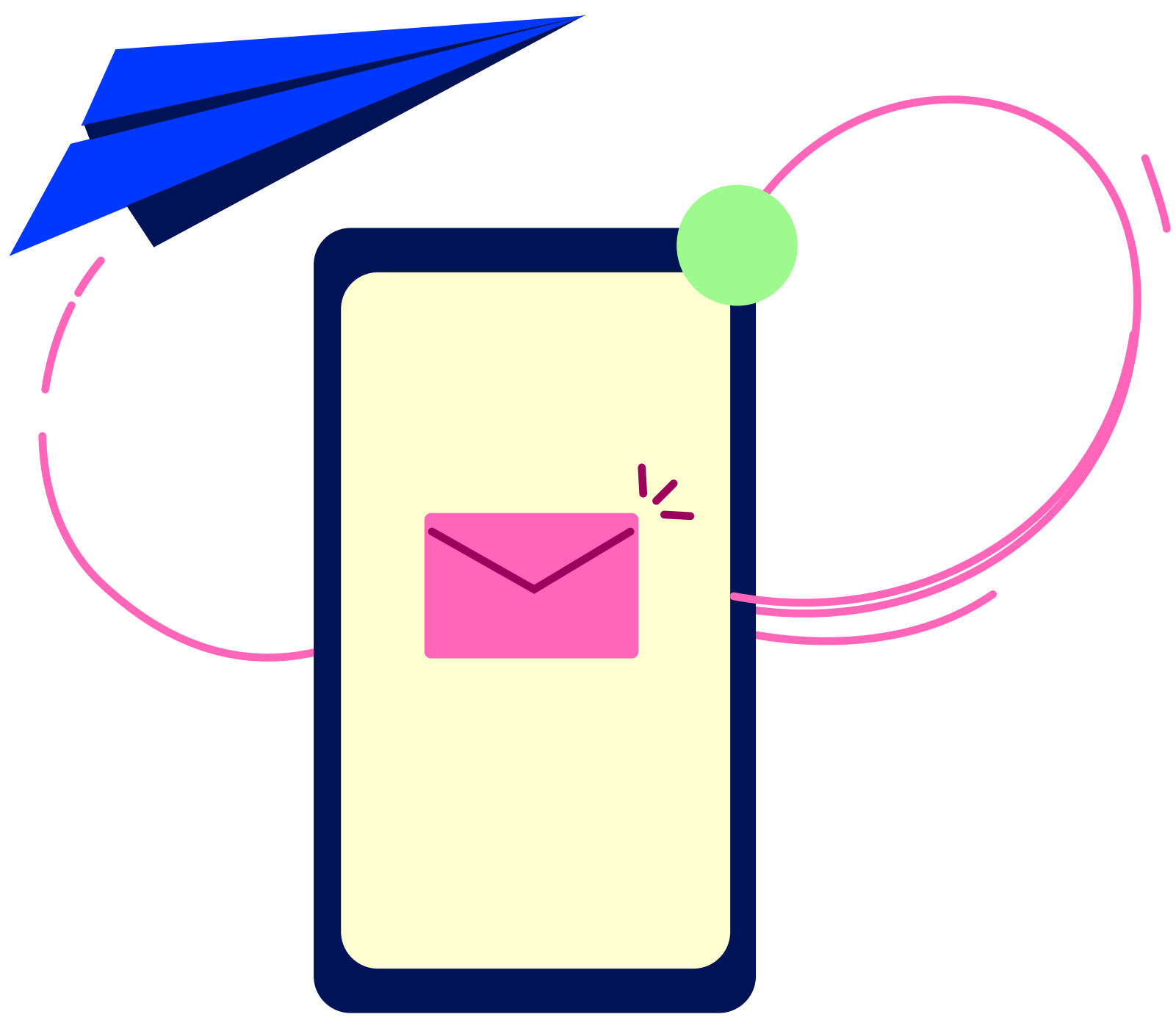
Say goodbye to channel hopping

- Borrowers can stay in their channel of choice
- No inter-departmental hand-offs needed for account opening

3

Free your mortgage teams from account opening procedures

- No need to rely on mortgage team members to cross-sell products
- Give your team the time and space to deliver mortgage experience excellence



4

Schedule follow up tasks and automated customer outreach

- Deepen relationships with continued engagement at your discretion
- Never miss an opportunity to get closer to your customers

Blend is different.

As today's FI leaders continue to streamline and optimize their workflows, it's all the more clear how critical timing can be — especially for cross-sell offers. Free your mortgage teams to focus on what really matters, leverage automation, and convert new deposits directly inside the application experience. Learn more about [operational leverage with MarketWise Advisors](#).