



# ONE SUITE CUSTOMER EXPERIENCE PLATFORM

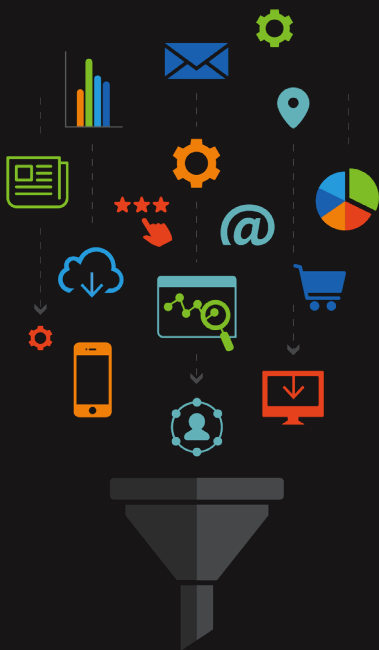
**ONEsuite: A powerful Customer Experience platform to communicate more effectively with your audience.**

O'Neil's ONEsuite platform leverages our 50+ year heritage of turning complex data into actionable insights to drive better results. Leveraging next-gen technology and machine learning, the innovative platform provides a comprehensive end-to-end customer communication solution to enable customer satisfaction.



## Data Integration, Synthetization + Management

## CORE CAPABILITIES



### Modernization of your Information Architecture

ONESuite begins with the platform's ability to support the collection, standardization and storage of data in a standard data model from a variety of sources, including core processing systems, customer relationship management (CRM) systems and external third-party sources. Our data science expertise enables more efficient composition, execution of business rules that determine variable content, personalization and targeted marketing messages, analytics, and business intelligence.

- Advanced Data Security
- "Out of the Box Functionality and Custom Integrations
- Data Management
- Data Cleaning and Normalization
- Social Media Data Integration with your Data





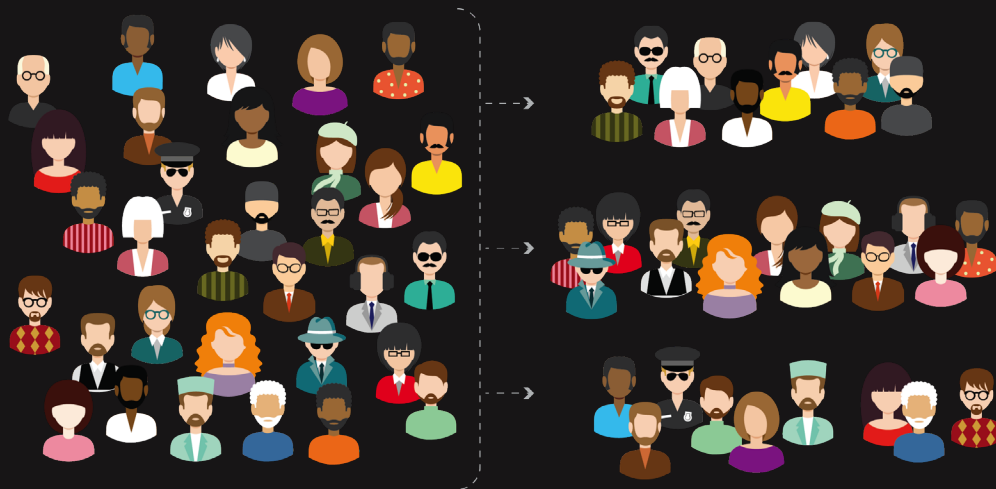
### Understand Your Audience

Optimize your organization's Client Engagement Management strategy by gaining valuable insight into who your audience really is. ONESuite's data analytics engine creates a deeper understanding of your individual audience members by combining your data with social determinants data. The sophistication of the platform's analytics enables the built-in machine learning solution to provide "next-best-action" to engage more effectively.

- Predictive Modeling
- Next Best Action
- AI + Machine Learning
- Social Determinants Data

### Live Customer Personas

O'Neil's ONEscore rating system allows you to create segmentations of your audience based on a scoring system with built-in "live" personas that provide deep insight into who your customers are, what they feel, and how they think.



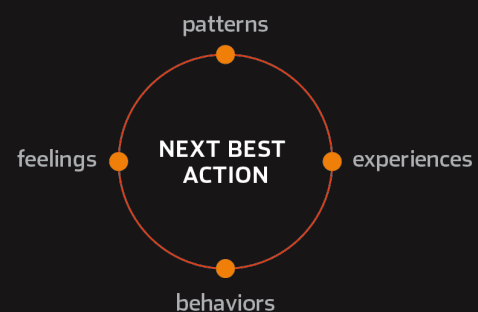
### Social Determinant of Health Insight

ONESuite incorporates SDOH data, artificial intelligence and predictive modeling to help clients improve their Net Promoter scores, customer satisfaction and retention.



### "Next Best Action" features for real-time decision making

Optimize your customer communications strategy by gaining valuable insight into who your audience really is. Our data analytics engine provides a deep understanding of individual audience members, with built in machine learning to provide "next-best-action" recommendations.





## Content Creation + Delivery

### CORE CAPABILITIES

### Content Creation, Management, and Delivery Tools

Create and manage content that is built with responsive design, allowing for seamless Omni-channel documents, email and SMS communications, as well as HTML 5, PowerPoint, and interactive video. Built-in Omni-channel delivery allows stakeholders to communicate personalized, variable, and complex communications across all media and channels.



- Self-Service or Managed Services
- Document & Asset Vault
- Template Creation & Management
- Workflow Creation & Approval Routing
- Omni-Channel Delivery



## Sales + Marketing Communications

### CORE CAPABILITIES

### Increase Customer Acquisition and Retention, Expand Relationships

ONESuite provides sales & marketing departments the ability to design, create and deliver personalized, omni-channel communications to increase sales, improve customer satisfaction, and retention.

- Campaign Builder
- Campaign Management
- Predictive Modeling + Analytics
- Omni-channel Campaign Orchestration
- Campaign Performance Dashboard

Optimize the Entire Customer Journey  
to Improve Customer Acquisition and Retention



**Brochure Builder**  
Customize Collateral



**Microsite Builder**  
Create Custom Websites



**Kit Builder**  
Create and Order Kits



**Pre Enrollment Tools**  
Online Engagement

### Build and Distribute Custom Sales Tools With Ease

Create customer journeys and multi-channel campaigns, and track results. Build customized marketing and educational microsites for your clients, build custom brochures and sales collateral, build and order sales and enrollment kits — all in one complete platform.

Eligible Participants <b>1,302,308</b>	Enrolled Participants <b>781,396</b>	Eligible Non Participants <b>520,912</b>	Newly Eligible Participants <b>45,136</b>	Avg. Deferral Rate (Newly Eligible...) <b>8.2%</b>	Total Assets <b>\$48.4B</b>
Avg. Account Balance <b>\$57,761.<sup>63</sup></b>	No. of Loans <b>44,044</b>	Avg. Loan Balance <b>\$28,921.<sup>42</sup></b>	Distribution Requests <b>37,268</b>	Accounts w/Balance Not Inv... <b>25,824</b>	Deferral Rate Growth (Existing...) <b>\$48.4B</b>



## Omni-Channel Communications

### CORE CAPABILITIES

### Digital Transformation + Omni-Channel Solutions

Modernize and strengthen your relationships by communicating the right message, in the right format, through the right channel.

ONESuite optimizes the composition process to generate the output according to a customer's predetermined delivery preferences.

- Preference Management
- eDelivery & ePresentment
- Print + Fulfillment
- Email, SMS, Microsites & PowerPoints
- Interactive Video
- Production Dashboard

### Real Time Production Status of Every Customer Touchpoint

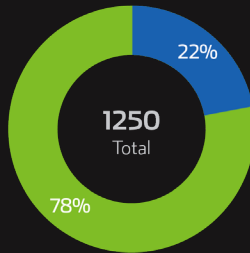
Maintain complete visibility into the document and content production process, with real-time SLA reporting. A dashboard provides the status of each document and data file, and allows clients to edit, approve, and track print and fulfillment production throughout the workflows.

Records Imported	On Hold	Suppressed	Pulled	Awaiting Approval	Approved	In Production	Shipped
1250	4	3	1	1242	0	0	0

#### Status

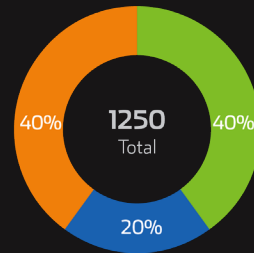
##### DELIVERY TYPE

Print	980
Digital Only	270
Email	0
Email & Print	0



##### PRODUCT TYPE

Letters	500
ID Cards	500
Bills	250

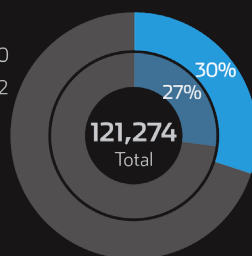


Total Sent	Delivered	Conversion Rate	Total Opens	Total Clicks	Unsubscribe
121,274	118,600 97.80%	1.19%	36,380 30.00%	7,274 6.00%	592 0.49%

#### Status

##### EMAIL OPENS

Total Opens	36,380
Unique Opens	32,742



##### EMAIL CLICKS

Total Clicks	7,274
Unique Clicks	6,029

