

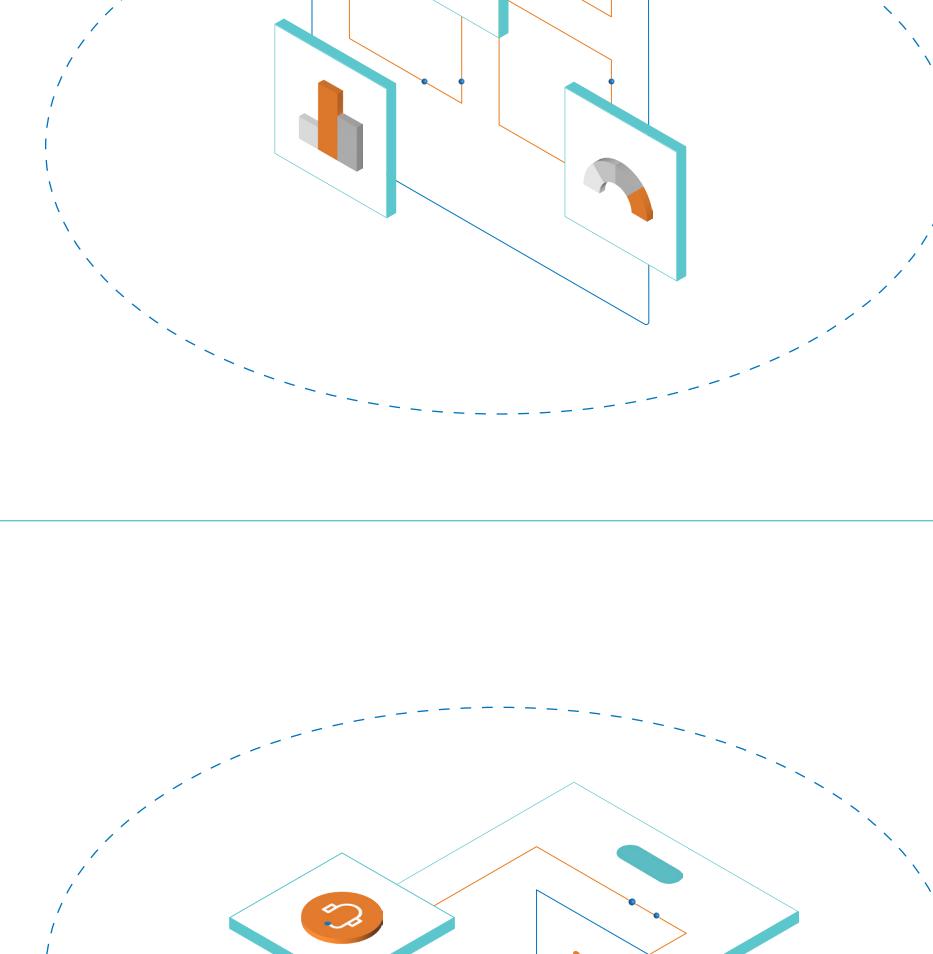
TRIGGER-BASED
LOAN ACQUISITION

Customer Experience Journey

DAY

01

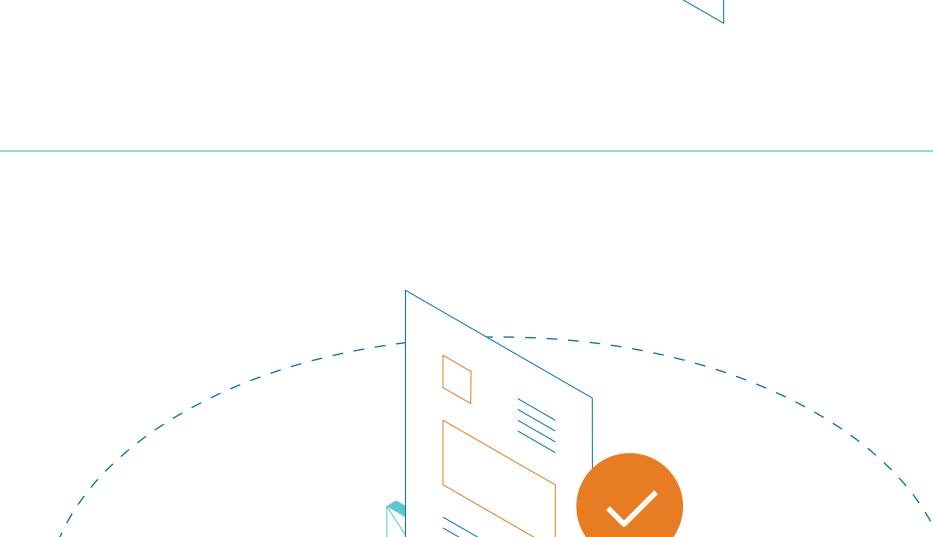
Lia is shopping for a mortgage* and undergoes a credit check



DAY

02

Lia receives a phone call and an email with a pre-selected offer the next day



DAY

03

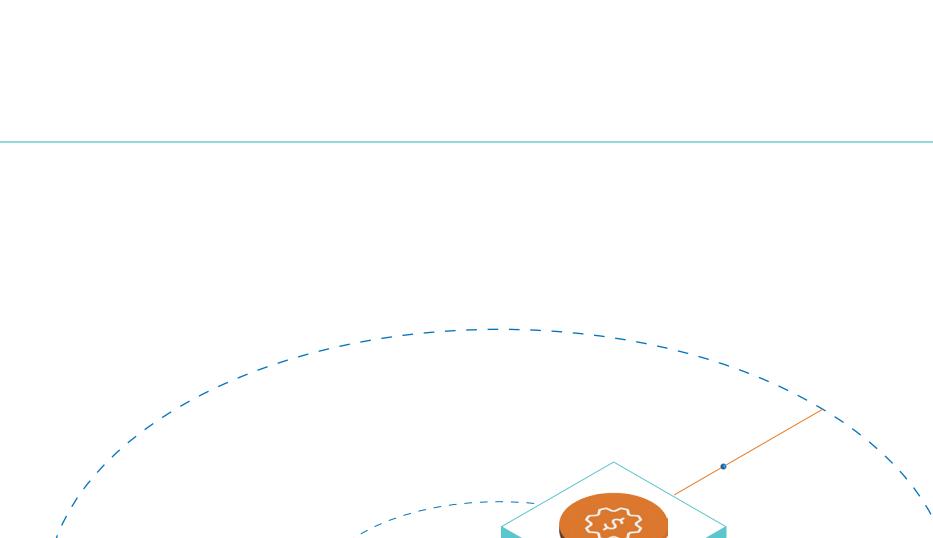
The same offer arrives via direct mail a few days later



DAY

04

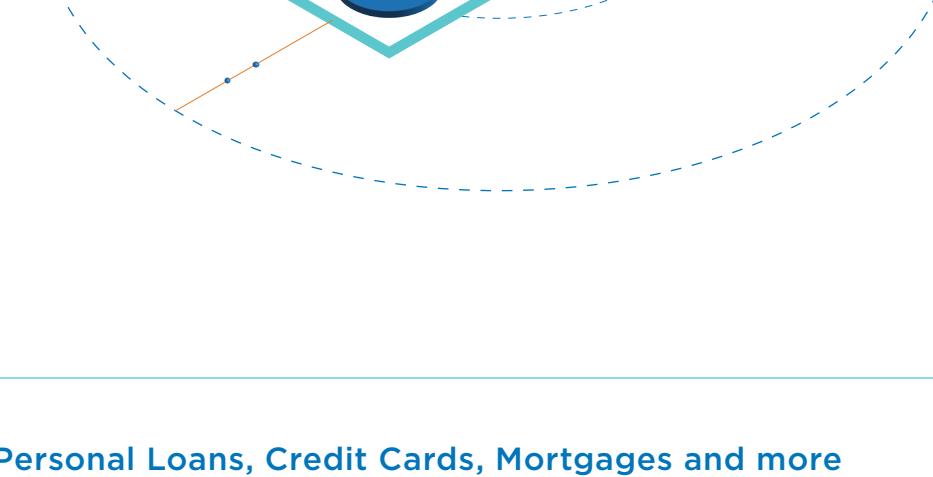
Lia accepts the loan offer and completes the mortgage application



DAY

05

Lia's mortgage is funded and she feels her financial institution understands and anticipates her needs



*For Auto Loans, Home Equity Loans, Personal Loans, Credit Cards, Mortgages, and more

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