

GROW

Core Relationships and Engagement

haberfeld.com
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SUPERIOR EXECUTION

Before you start marketing, we set you up for success. We'll evaluate your institution to ensure you're going after prospects with the most intelligent products and appealing incentives backed by sound policies and efficient processes. We bake it all in with custom training tailored to your organization.

TARGETED MARKETING

We use big data and intelligent analytics to power precision delivery of omnichannel tactics. Our data science enables predictive modeling to correlate travel patterns from households within your marketplace to your geo-based branch locations. Get the right message in front of the right people at the right time.

REFERRALS

The best accountholders are the ones who know and like you so much they'll evangelize your products, people and culture. Our turnkey referral strategy takes advantage of interactions between accountholders and your frontline, and even includes a digital solution that makes referring fast, convenient and effective.

CUSTOMIZED TRAINING

How do our clients sustain amazing results year after year? It's the training! Our experienced consulting team works with you from the start, helping create a culture of engagement that ensures execution throughout your organization. With everyone on board you'll be amazed at what's possible.

**WATCH THE
INTRODUCTORY VIDEO**
haberfeld.com/grow

HIGH PERFORMANCE GROWTH™ STRATEGY

SETUP

1. Intelligent products
2. Responsible policies
3. Efficient process
4. Effective training
5. Appealing incentives

DRIVE TRAFFIC

6. Targeted marketing
7. Referrals
8. Measuring & benchmarking

TALENT MANAGEMENT

9. Leadership development
10. Continuous training

7.5M NEW CORE
RELATIONSHIPS added by
Haberfeld in the last decade

2X CHECKING
ACCOUNT OPENINGS

Typical result is to more than
double new account openings

6.2 AVG HOUSEHOLD
PRODUCTS & SERVICES

Client average per new
household