

personetics® | PrimacyEdge

Turn Every Account Into a Primary Relationship

Activate

● 01/20/2025

Make Payday Effortless!

Set up direct deposit for a fast and secure access to your salary!



[More Info](#)

[Set Up Direct Deposit](#)

Deepen

● 04/28/2025

Get More from Your Credit

Check out how our Maple Bank credit card can benefit you!



[More Info](#)

[Apply Now](#)

Retain

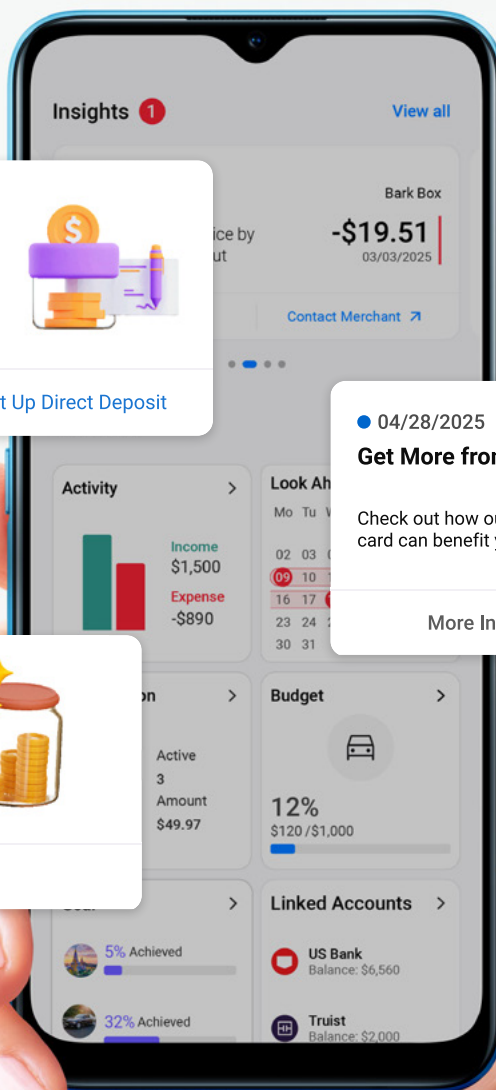
● 08/08/2026

Restart Your Savings

Haven't saved lately?
Time to get back on track!



[More Info](#)



Become your customers' go-to financial partner with real-time indicators and contextual insights that help boost account activation, capture external funds, and reduce churn – enabled by Personetics AI-powered Cognitive Banking Platform.



Detect Primacy Signals Without Requiring Open Banking

Gain visibility into external activity such as savings, payments, and card usage – to proactively identify primacy risks and opportunities you can act on.



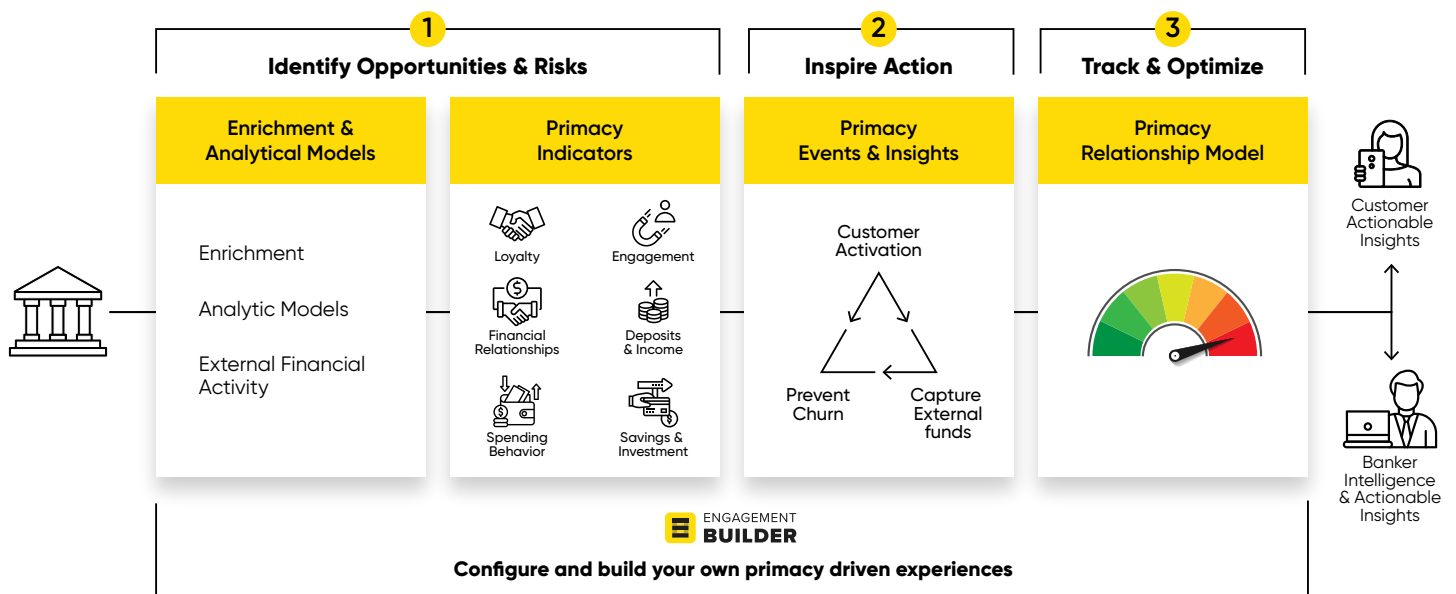
Inspire Action Across the Customer Lifecycle

From onboarding, through deepening, to retention – inspire action with contextual insights that help you deepen relationships and grow share of wallet.

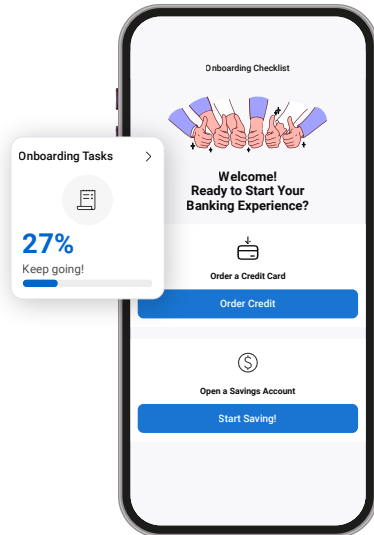


Build Your Own Primacy Experience

Easily customize and create insights—including messaging, logic, and design—to match your bank's primacy strategy.



Driving Proactive Primacy Across the Customer Lifecycle

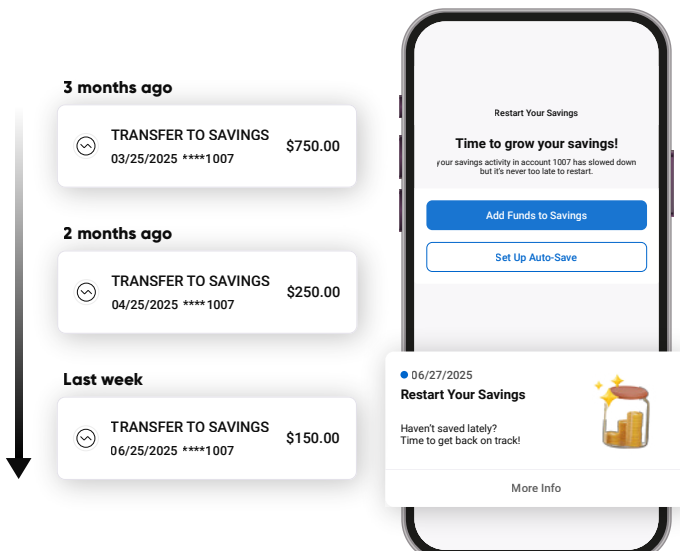
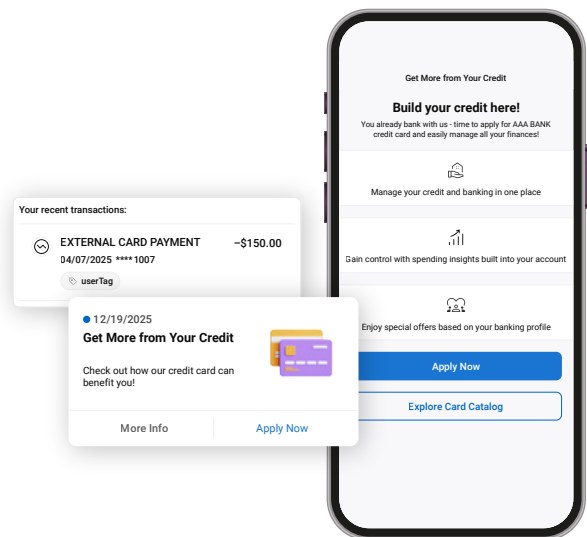


Activate New Customers

Drive account activation within the first crucial 90 days through a guided onboarding checklist, nudges, and progress trackers.

Deepen Engagement

Convert secondary to primary customers by detecting external financial activity and delivering contextual, real-time offers that help you grow share of wallet.



Retain "At-Risk" Customers

Spot early churn signals—such as reduced savings or card inactivity—and re-engage dormant customers with tailored offers that you can configure to your business needs.

Key Features

✓ Primacy Enrichment & Events

Gain deeper understanding of customers' financial activity—including products, changes in account activity, and income stability—with dedicated enrichment and analytical models.

✓ Actionable Insights

Grow share of wallet and increase retention with prebuilt contextual insights that help identify and capitalize on external financial activity across savings, checking, credit and more.

✓ Onboarding Tracker

Optimize onboarding with a guided, configurable checklist that drives key actions like direct deposits, auto-bill payments, and card activation.

✓ Engagement Builder

Customize your own Primacy insights, with a no-code platform and enriched data attributes covering both internal and external financial activity indications.

Why Primacy Matters?

Without primacy, banks lose deposits, loyalty, and revenue.
The numbers speak for themselves:

73%

engage with multiple
banks beyond their
main bank
(Accenture)

30-40%

of digital accounts
never activate in
first 90-days
(BCG)

10X

more deposits from
primary vs. secondary
customers
(Curinos)

Contact Us Today to Unlock the Power of Cognitive Banking

New York • London • Singapore • São Paulo • Tel Aviv

