

# STATEMENT MARKETING SOLUTIONS

## FACT SHEET

Transform your monthly statements into a dynamic new marketing channel.

Statements are one of the most valuable ways to regularly communicate with your customers.

Our cutting edge technology allows you to customise statements to directly target specific customer segments with relevant products and services.

Commonly referred to in the industry as 'Transpromo', this transforms a standard method of communication into a valuable marketing tool, generating new revenue streams.

**EASY-PLUS ACCOUNT**  
20 Mar - 19 Apr

Mr John Saver  
Account Number: 0123456789  
Branch: Sometown 99-38-61

**Summary - 19 April 2006**

Start Balance	£1,867.00
Money in	£2,402.00
Money out	£2,404.00
<b>End Balance</b>	<b>£499.62</b>

Date	Description	Money out	Money in	Balance
20 Mar	<b>Start Balance</b>			1,867.00
21 Mar	Payment to Sunshine Stores	67.50		1,799.50
	Received from A.N. Employer		580.00	2,379.50
25 Mar	Payment to JSupermarket	155.50		2,224.00
26 Mar	Payment to A. Loan Ltd	505.57		1,718.43
	Payment to Sunshine Stores	67.50		1,650.93
	Payment to JSupermarket	53.24		1,597.69
	Payment to Sunshine Stores	8.50		1,589.19
29 Mar	Payment to JSupermarket	50.00		1,539.19
1 Apr	Payment to Sunshine Stores	25.50		1,513.69
	Payment to JSupermarket	38.54		1,475.15
1 Apr	Withdrawal at HoleWall Bank			1,436.61
3 Apr	Payment to CableTV	58.34		1,398.07
	Payment to Telecommunications Inc			1,398.07
	Ref: XYZ-323-66789			1,398.07
	Payment to Sometown City Council	23.55	1,835.65	3,233.72
	Ref: Council Tax			3,212.49
4 Apr	Payment to EnergyCo.			3,198.17
5 Apr	Received from O.T Employer Plc	21.23		3,176.94
	Payment to CableTV Ltd	7.32		3,169.62
	Payment to JSupermarket			3,169.62

**Demand more from a credit card**

- more financial benefits
- more exclusive privileges
- more recognition and rewards

**OPTIMAL MUTUAL Credit Card**

The overall cost for comparison is: 5.6% APR. \*Fee Free\* Version also available!

Your message here

COMPUTERSHARE INVESTOR SERVICES PLC  
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# HOW DYNAMIC SEGMENTATION WORKS

Computershare allows you to directly target specific customers - right on the statement itself. Here's how:

- > We work with you to identify which segment of your customer base is most likely to enquire or purchase a specific product or service
- > Your customer base is then sorted according to the characteristics you define
- > Our automated system prints approved messages and graphics on each individual's statement, providing meaningful targeted promotions.

For example, you might want to promote home insurance to customers who hold a mortgage with you but no insurance.

We would work with you to isolate this segment of your customer base, sort the data and create an eye-catching message to insert into the statement.

## Example of car loan promotion



A SMOOTH 4.8% interest on **NEW CAR LOANS**

There has never been a better time to get that new car. Take advantage of our low interest rates. Learn more by calling 0800 123 1234 or visit online at [www.optimal.co.uk](http://www.optimal.co.uk)

## Example of mortgage promotion



**10 Year Fixed Rate Mortgage**

Our 10 Year Fixed Rate Mortgage offers a competitive rate and peace of mind that should interest rates rise, your monthly payments will remain the same.

**4.99%** (up to 90% Loan to Value)

Fixed up to and including 1 January 2017 then changing to the Bank of England Base Rate + 0.95%.

The overall cost for comparison is: 5.6% APR. \*Fee Free\* Version also available!

## KEY BENEFITS

### CREATE A VALUABLE MARKETING TOOL

By providing targeted marketing messages on your statements we can help you communicate the following:

- > Alternative statements for demographics such as children or senior citizens
- > Specific campaigns or promotions on your customer statements
- > Time-sensitive information such as interest rate changes.

### EASY-TO-USE, STREAMLINED DESIGN

Our professional design transforms your customer statements into easy-to-navigate, visually appealing communication tools. Intelligent laser printing and standard stationery reduces costs and risk while providing consistency in look and feel.

Regardless of the customer's delivery preference (online or paper) you can communicate the right message at the right time.

### ELECTRONIC DELIVERY VIA VIEWPOINT

Viewpoint is our web-based solution enabling customers, call centre agents and intermediaries to instantly view documents that have been distributed to customers.

### PEACE OF MIND

We offer a complete solution, utilising the wide range of resources available within the global Computershare Group. From design and segmentation of your database, to print and distribution, the entire service is kept under one roof at our premises in Bristol.

You can have complete confidence when outsourcing your customer communications to Computershare. We have procedures in place in the event of a disaster recovery situation and we also have the industry standard accreditation in ISO 9001 and APACS security.

### ADDITIONAL SERVICE OFFERINGS

In addition to the core offering, Computershare can provide cost savings to you through a variety of optional services:

- > We can assist you with the creation, printing and distribution of various customer communications such as credit card statements, tax notices, bills, payments, certificates, surveys, contracts, proxies and welcome kits.
- > We can help you reduce your overheads for all correspondence to your customers and shareholders by using Computershare as a 'one stop shop' for all your communication requirements.