



Managing Offers at Scale for Top U.S. Financial Institutions

Offer Management with Naehas

We help financial institutions that need to acquire more customers. Our Offer Management solution allows teams to create **4X** more personalized offers **90%** faster. Unlike our competitors, we're business configurable and reduce total cost of ownership by **60%**.

File-based marketing breaks at scale

Slow launches

Campaigns take **3–9 months**, and teams manually create **1,500+** creative variations per offer for every channel.

Content chaos

Thousands of fragments are scattered across documents, digital asset managers, and other systems.

Compliance drag

Reviewers recheck the same text **10+** times.

High risk

Misaligned disclosures result in fines. Since 2008, banks have paid **\$450 billion** in penalties and have faced **51,000** regulatory changes.

Marketing bottleneck

Strategy and execution are stalled by manual reentry and swivel chair processes.

With Naehas, offers are...



Created once: Define base offer, variants, incentives and eligibility conditions, governed content and disclosures, and fulfillment profiles.



Approved once: Compliance approval travels with the offer package comprising of governed objects with their own ID, rules, and approvals.



Reused everywhere: Campaigns reference approved offers from the catalog, and channels pull those via API, ensuring consistency across every touchpoint.



Scaled globally: Local markets adapt for language, regulation, and currency, but all inherit from one governed core.

Results with Naehas

51-66 days

faster time-to-market

82%

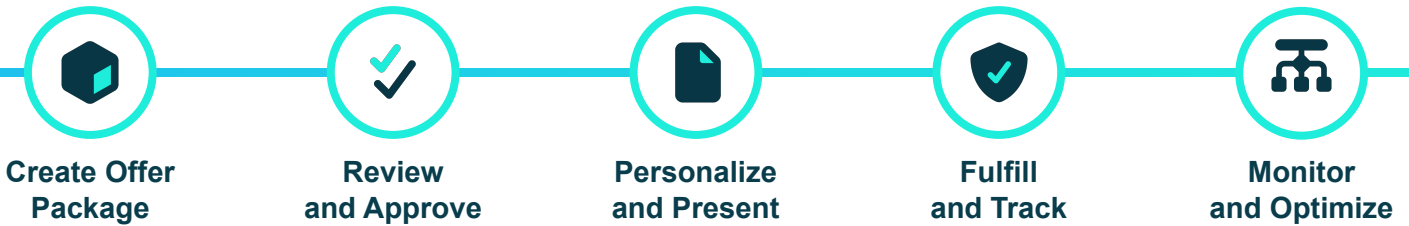
fewer clicks

70%

reduction in offer launch timelines

79%

reduction in manual setup steps



Why

Banks spend weeks building **20–50** creative variations per offer, resulting in delays, errors, and compliance rework. One creative can rely on **6+** governed elements, multiple teams, and systems to get to market:

- Base offer and variants
- Eligibility
- Incentives
- Governed offer and product content
- Disclosures
- Fulfillment

How

One dynamic template with tokens generates **100+** variations instantly.

What

Edit once and apply to banners, disclosures, and all channels. Update in sync.

- **Self-service offer setup:** Marketing configures offers without IT tickets.
- **Locked offers:** Approved offers are locked.
- **Cross-channel reuse:** One approved offer appears in web, app, email, branch, print.

Offer Template & Variants
Configurable, reusable, auto-filled

Smart Content Editing
WYSIWYG, tokens, instant preview

Built-in Guardrails
Rules and validation for compliance

Governed Workflows
Role-based AI and collaborative review

Linked Disclosures & Codes
Traceable, auto-managed versions and downstream integrations