



# 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