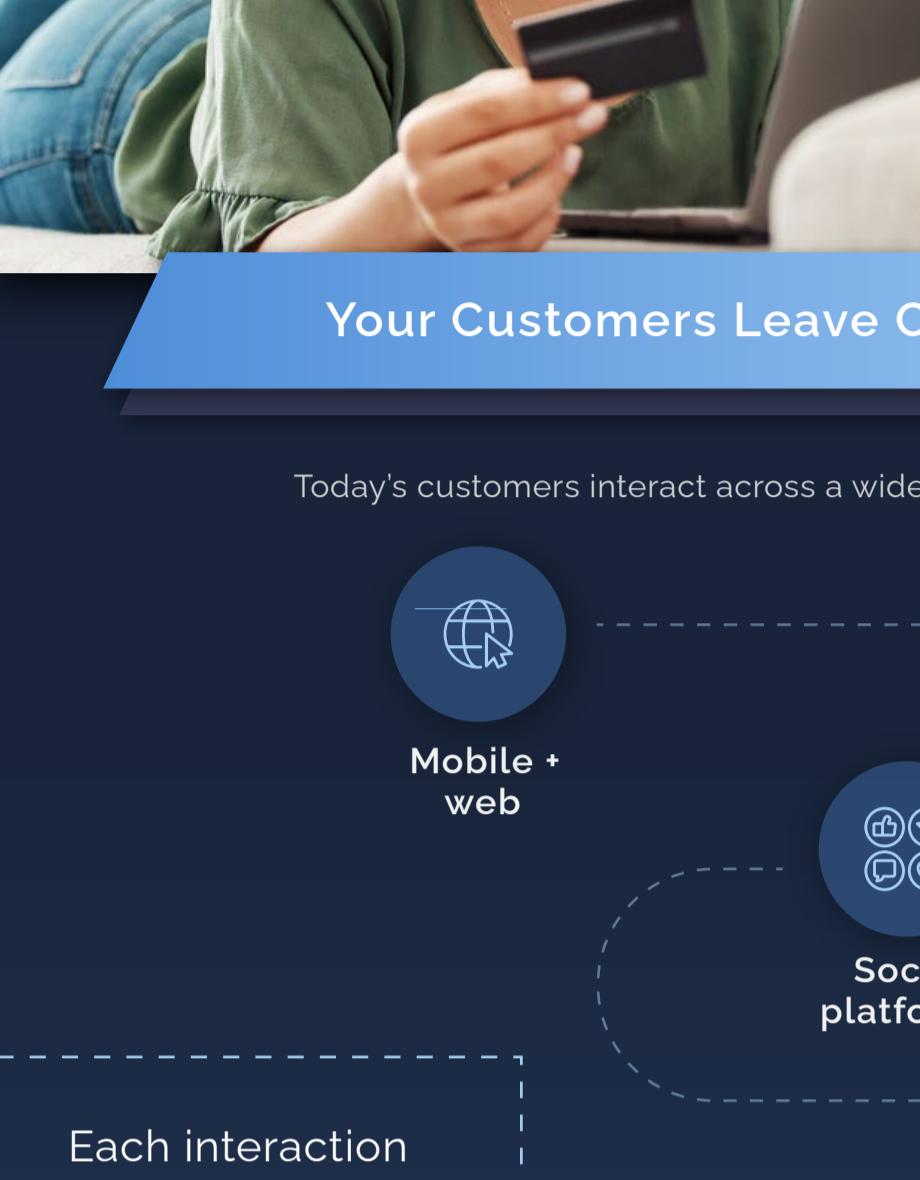


Do You Really Know Your Retail Bank Customers?

Transactions Show History – Not Insight.

Balances, deposits, and loan activity only explain what already happened. Customers expect relevance in the moment, across every channel.

Banks need a connected, always-current understanding of every customer and household.



\$	\$	\$	\$	\$
\$	\$	\$	\$	\$

1 of 10 = Revenue and Transaction Volumes are a fraction of the data sets Boston Consulting Group recommends for a **360 client view**.¹

Your Customers Leave Clues Everywhere

Today's customers interact across a wide network of touchpoints:



Mobile + web



Social platforms



Branch + call center



AI chat + virtual assistants



72% of customers say personalization influences their choice of bank²

Your CRM Can't See the Whole Customer

Nearly half of retail banks rely on CRM systems³, but even the most advanced CRM cannot:

- ✗ Unify data from siloed systems
- ✗ Resolve identities across devices and households
- ✗ Update profiles in sub-second real time

Without this foundation, personalization becomes guesswork – and AI outputs become unreliable.



92%

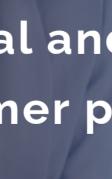
92% of banking leaders report that the data they need is either unavailable or takes too long to retrieve.⁴

What a Complete Customer Profile Includes

The modern bank blends:



Clean transactional data



Behavioral + engagement signals



Demographics + life-stage context



Household + device-level identity resolution

To learn more, visit www.redpointglobal.com

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Sources: 1. Boston Consulting Group. 2. Accenture Banking Consumer Study 2025. 3. ABA, 2025. 4. Deloitte, 2024. 5. The Financial Brand.

1/3

Using data related to socio-economic profiles and customer behavior can help cut average attrition rates by more than one-third⁵

Move From Transactions to Relationships

The Redpoint Data Readiness Hub unifies every signal – transactional, behavioral and contextual – into a real-time, accurate customer profile built on your data.

That's how banks deepen relationships and drive growth.