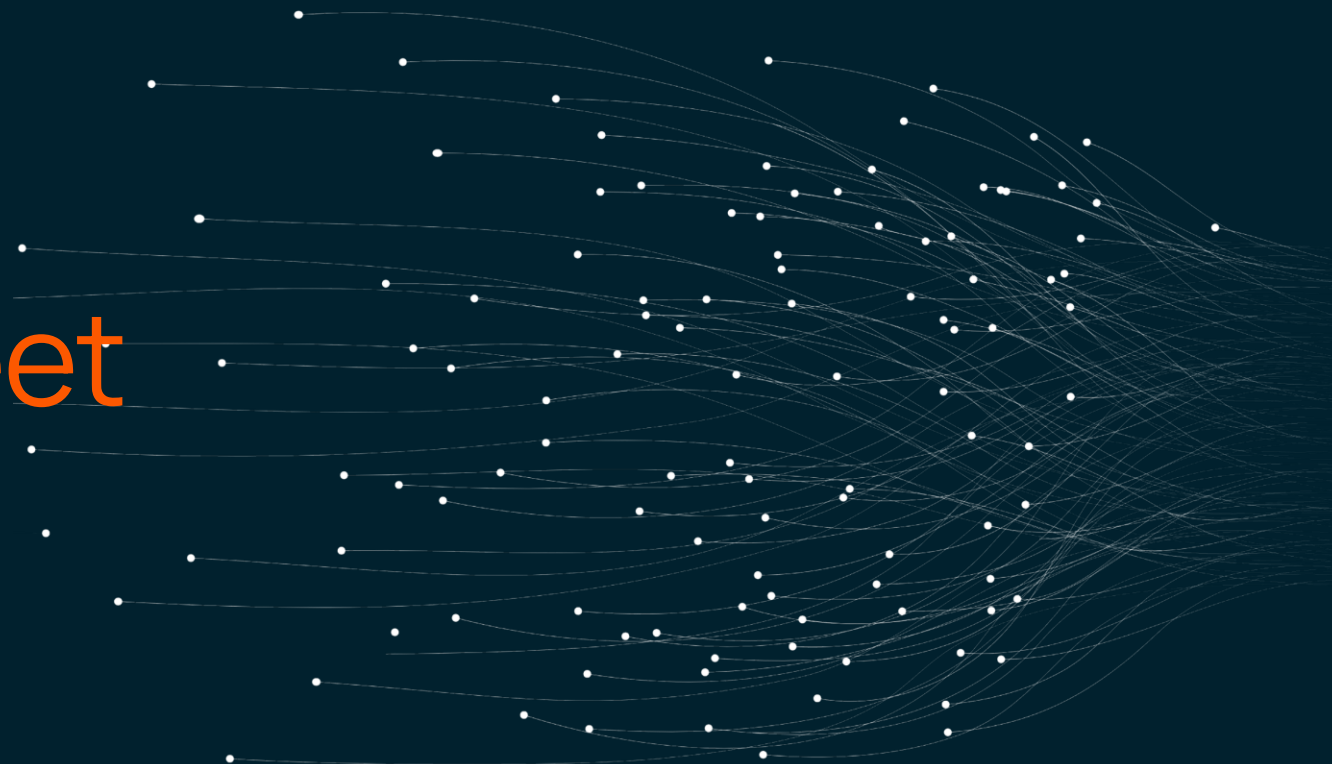


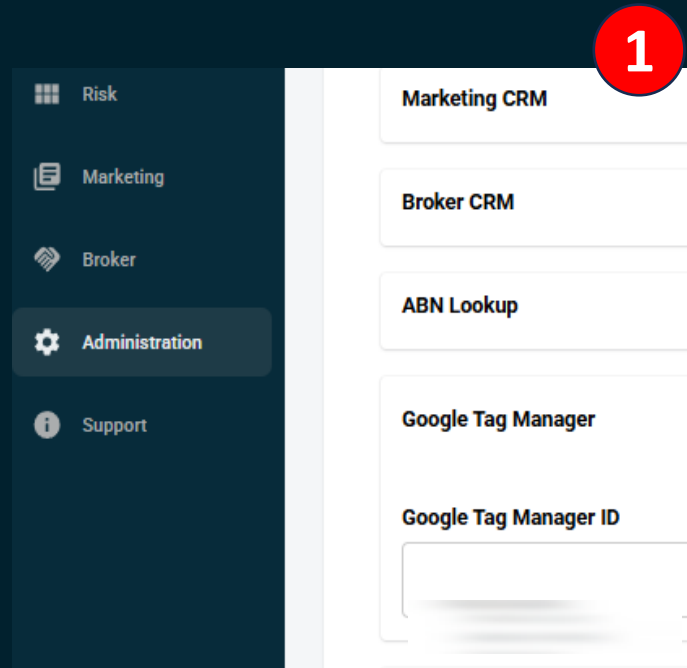
nimo

Marketing Tips Sheet

NSN – April '26 session

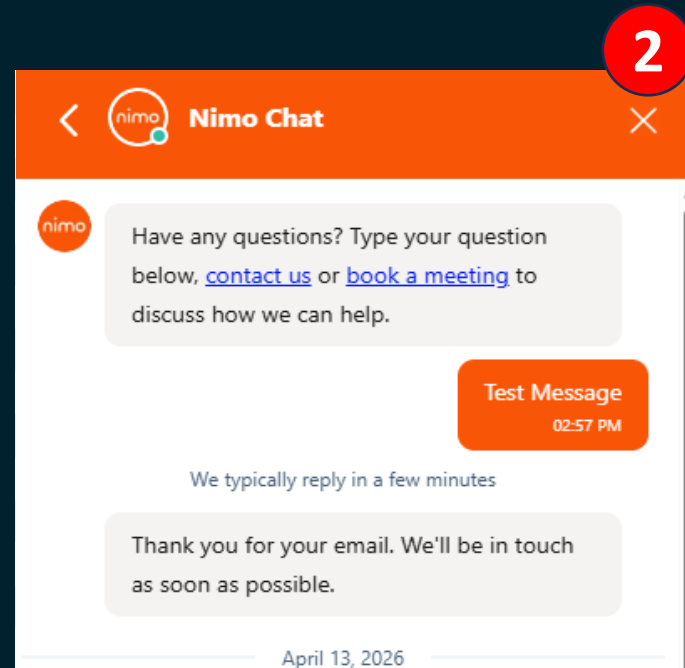


Marketing



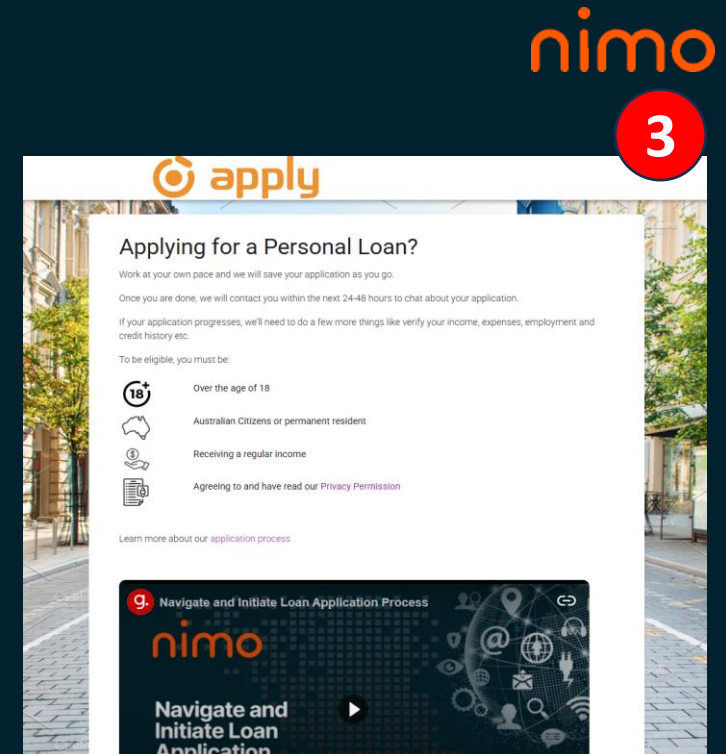
Google Tag Manager

Tag Manager gives you the ability to add and update your own tags for conversion tracking, site analytics, remarketing, and more.



General Shortcode

This feature in Nimo allows banks to create reusable code snippets, like JavaScript or HTML, that can be dynamically inserted into different stages of the loan application.



Form Configurations

Use a HTML editor to embed a quick 20-30 second instructional video or adjust the icons or brand colour through the HTML editor

Marketing tools



Google Tag Manager (GTM)

- Can be used to track the exact pages of a customer form that a potential borrower drops out of the process.
- If you are using GTM already, you simply need the Google Tag Manager ID to drop into the Nimo platform
Administration > Integrations > Google Tag manager
- All you need to do is follow the setup process which is completed through your Google Tag Manager portal (Google Analytics). Nimo can help provide guidance
- To start the process, reach out to your Nimo RM to start the conversation

General Shortcode

- Can be used for a range of different functionality including: Display galleries, inserting audio files, embedding videos, live chat connections

Form Customisation

- Changing or adding to the HTML in a form
- Using a HTML-to-Word editor ensures that there is very little reliance of HTML knowledge needed. You can build out your email templates even using the icons such as adding an image in, dropping in links.
- Adding in a short 20-30 second explainer vide at the start of your Customer Application forms.

General Shortcode



What needs to happen

The HubSpot chat script is injected using Nimo's General Shortcode. The Nimo page can not be sandboxed or iframe-restricted. Cross-domain tracking is configured in HubSpot (or other CRM). Security/compliance approval is granted by the organisation.

Work with your CRM provider first.

How does it work?

The Nimo form loads HubSpot's (or other CRM's) chat script directly into the page (via the General Shortcode). HubSpot chat can work as if it were your own site. The General Shortcode effectively allows you to Inject:

- ☐ HubSpot tracking
- ☐ HubSpot chat widget

What does it enable?

Is the Live Chat function a human or attached to a Knowledgebase? The answer really depends on how you set this up through your CRM. For example, in HubSpot, Live-Chat can be configured several ways:

1. Knowledge base/static library (**self-service**)
2. Human-to-human (**Live Chat**)
3. Hybrid Setup (**Bot 1st, then handoff to a Human**)

Important Caveats

1. Chat continuity (context may reset)
 - The conversation itself will persist
 - But the page context will change
 - HubSpot may treat this as a "new pageview on another site"
2. Practically:
 - ✓ Same browser session
 - ✓ Same visitor
 - x Some analytics continuity

Cross-domain tracking

You **must**:

- Enable **cross-domain tracking** in Hubspot
- Ensure the same Hubspot **Portal ID is used everywhere**

Other CRMs

Can it be used in other CRMs? Yes, the same principle applies to Salesforce, Zoho and most modern CRMs. The following must all happen:

1. The CRM's **chat widget runs via a JavaScript embed**
2. That script can be **injected into the external page (yes through the General Shortcode Integration)**
3. The external page is **not sandboxed or locked down**
4. Cross-domain tracking or identity handling is configured (if continuity matters)

Google Tag Manager ID



What is it?



A Google Tag Manager ID (GTM ID) is a unique alphanumeric identifier, typically formatted as GTM-XXXXXX, that represents a specific container in Google Tag Manager (GTM).

It acts as the bridge between a website and the GTM container, enabling the deployment of tracking codes (e.g., Google Analytics, Facebook Pixel) without modifying site code.

Where to find it?



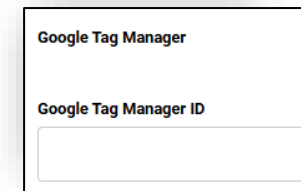
Visible in the top right corner of the dashboard after logging into tagmanager.google.com.

Always begins with "GTM-" followed by a series of letters and numbers.

NOTE: Do not confuse it with a Google Tag ID

How do I set it up in Nimo?

The setup through Nimo is very simple. You just need to put the Google Tag Manager ID into the space provided. Go to **Administration > Integrations > Google Tag Manager**



The screenshot shows a form titled "Google Tag Manager" with a sub-label "Google Tag Manager ID" and an empty text input field below it.

It's all too hard



This is something that is best investigated through your Google Analytics Support function.

If you really want to investigate it yourself, there are some amazing YouTube videos available. Start by searching *"How can GTM be added on an external link?"*

Important Caveats



You may need to configure a trigger that detects when a link's destination URL is outside your domain and attach that trigger to a tracking tag such as a Google Analytics 4 Event.

1. Enable Click Variables
2. Create an 'Outbound Link' trigger
3. Create the tracking tag

Form customisation



Form Name
2. NIMO - Personal Loan

Shared Aggregators
Aggregator

Look up aggregators

Include form cover page
Form cover page text (html format)

Include stepper list on cover page

Is this a staff form?

Form submission landing page URL
<https://www.bankwaw.com.au/>

Available Modules **Active Modules**

Iframe embed code for a video

```
<iframe width="700px" height="400px" src="https://embed.app.guidde.com/playbooks/iZ321t8oJra6KmcEXxmrRN?mode=videoOnly" title="Applying for a Personal Loan Step by Step" frameborder="0" referrerpolicy="unsafe-url" allowfullscreen="true" allow="clipboard-write" sandbox="allow-popups allow-popups-to-escape-sandbox allow-scripts allow-forms allow-same-origin allow-presentation" style="border-radius: 10px"></iframe>
<div style="display: none">
<p>00:00: This video demonstrates the process of applying for a personal loan from the initial</p>
<p>00:04: landing page to selecting the loan purpose.</p>
<p>00:07: It guides you through the early steps to ensure a smooth application experience.</p>
<p>00:16: Okay, we're just about to apply for a personal loan.</p>
<p>00:19: Once we've brought up the landing page, scroll down to the bottom and click Get</p>
<p>00:23: Started.</p>
<p>00:31: We'll bring up step one of 11, and the first step is purpose personal loan.</p>
<p>00:35: So we need to answer the question,</p>
<p>00:37: why are you looking for a loan?</p>
<p>00:39: Is it making a purchase or is it refinancing? </p>
<p>00:43: financing alone.</p>
<p>00:45: We're going to choose making a purchase.</p>
<p>00:48: The video covers starting a personal loan application and choosing the loan purpose,</p>
<p>00:52: focusing on making a purchase as the reason for borrowing.</p>
</div>
```

Form builder

Inside the form where the HTML code sits you can embed anything you want to spruce up your form. Try testing in the UAT environment with videos, images, icons, Cascade Style Sheets (CSS) – Can be anything from; different progress bars, tooltips, tabs, hover effects, animations tables, tags and many many more.

Your code can be added on any page

To add something different to the “Get Started” page use the main section as shown on the left. In the example above this is a Video iframe embed code. First the video was created in a separate program then the code was copied and simply pasted in the right section of the form. To add to a specific step, open each of the modules to add the code into the top section called “Module label (HTML)”.

Marketing tools from the session



During the session, Nimo used live demonstrations and visuals to showcase several tools that support and complement our marketing activities.

Video Guide

<https://www.guidde.com/>

Nimo uses a tool called “Guidde” to make short instructional videos. Further examples can be found on Nimo’s Support Layer.

HTML Editor

<https://wordhtml.com/>

Word to HTML - Online Converter, Editor and Cleaner. This is one of the easiest free editors to use on the market.

HTML Editor

<https://html-online.com/html-editor/>

Another good free option that starts with another good sample in the editor as a template.

HTML Editor

W3Schools Tryit Editor (google)

This is a genuine training school. You can also just make use of their free editor and their CSS for use in your customer forms.