

Banzai!

Partner Guide

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1. Direct: Your Community Platform

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1.1 Wellness Center (Co-Branded Website)

The Wellness Center offers 200+ hours of financial and life literacy resources: calculators, Coaches, articles, assessments, and courses. It's fully customizable and co-branded with your logo and Banzai's.

Why it helps your business:

Positions your institution as a trustworthy, always-on financial guide; keeps your brand in front of consumers during key life moments; and provides a measurable destination you can promote in campaigns and at events.

1.1.a Wellness Center Resource Types (At-a-Glance)

The Wellness Center is home to a variety of hands-on learning resources, each of which are listed below:

Banzai Articles

In-depth, easy-to-understand articles that help explain hard-to-understand financial concepts to users.

Banzai Calculators

Simple, well-designed, and practical calculators that help students make a budget, predict loan payments, and more.

Banzai Coaches

Like a virtual financial advisor, the Coach teaches users how to understand unique financial situations.

Banzai Courses

Use real-life scenarios to demonstrate the power of good financial planning. They're great for kids, teens, and young adults and teach basic and advanced life-literacy concepts.

External Resources

Add your own blogs, articles, and other resources to your Wellness Center. Each external link appears as a titled card with an auto-generated illustration, directing users to the content you choose.

Why it helps your business:

Different content types meet users at every stage of the journey—articles for discovery, coaches/courses for consideration, calculators for decision-making—creating more touchpoints to nurture future and current account holders.

1.1.b Featured Resources for Targeted Engagement

Highlight key resources at the top of your Wellness Center home page, with collections below. This section auto-fills with popular Banzai content, or you can choose specific resources to meet your audience's needs and plan for a more targeted engagement campaign.

Why it helps your business:

Helps you pinpoint the topics your audience needs right now (e.g., homebuying season, tax time), lift click-through to high-value content, and run focused campaigns that convert better because they're relevant.

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1.1.c Custom Resource Collections

Choose from 40+ life-literacy collections to feature at the top of your Wellness Center—up to three at a time. Swap them anytime or work with your Banzai rep to create custom collections that keep your content fresh and engaging.

Why it helps your business:

Create topical hubs (e.g., "First-Time Homebuyers") you can promote as campaign landing pages which are great for paid traffic, email, and partner referrals. Plus, you can refresh them over time to sustain engagement.

1.2 Customer Usage Insights

In your **Manager**, reporting tools for Articles, Coaches, Calculators, and Courses show how often resources are used, identify active users, and display visual graphs to track engagement. These tools capture page views, unique visitors, sessions, and participant activity.

Two additional tracking pages let you see where new leads are generated, view contact details, and track **Rewards** earned.

All reporting pages include CSV export options, making it simple to create reports, proposals, and strategic plans.

Why it helps your business:

See what content resonates, prove impact to stakeholders, prioritize outreach to warm schools/segments, and optimize offers/CTAs based on real usage—not guesswork.

1.3 Flexible Branding & Customization Options

Customize Your User Experience.

Customize your Wellness Center to match your brand. Add your logo, choose colors, pick a light or dark theme, and select from six fonts.

Whether you prefer illustrated or photo-based designs, you'll create a seamless, branded experience. Your logo appears throughout the platform, and embedded resources can even boost your website's performance.

Why it helps your business:

Consistent branding increases trust and conversion. Matching the look/feel (and carrying that into embedded tools) reduces friction, keeps users on-site longer, and supports better engagement signals.

1.4 Ready-Made Presentations for Events

Get access to ready-made presentations and handouts on key financial topics like budgeting, saving, credit, and debt — all created by Banzai's curriculum team.

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Use these materials to host community events such as workshops, youth programs, small business meetups, senior seminars, or faith-based gatherings.

Hosting these events builds trust and visibility in your community while positioning your institution as a go-to resource for financial guidance.

The best part? No prep work required.

Why it helps your business:

High-touch moments build credibility fast. Presentations create face-to-face trust, generate leads, and give you community PR stories you can repurpose across channels.

1.5 Shareable Wellness Centers for Partners

Create co-branded sites for your community partners, giving them tools to teach, share, and promote Banzai's financial literacy resources. These sites strengthen relationships, boost your brand's visibility, and open doors to future partnerships.

Why it helps your business:

Scale your reach via co-marketing. Partners amplify your brand to their audiences, drive referral traffic, and open doors for partnerships and future collaborations.

1.6 Embeddable Tools for Your Website

Supplement existing website content with Banzai's interactive tools—like budget and savings calculators and financial Coaches. These activities can be embedded directly onto your site, seamlessly blending with your own blogs and resources.

Embedded content automatically updates to match your chosen fonts and colors, which you can preview and test in the Banzai Manager. (Permanent style changes require your Banzai representative.)

Why it helps your business:

Interactive tools (calculators, coaches) keep users on your site longer and increase engagement, which are strong quality signals that correlate with improved search performance. They also earn natural backlinks because people share practical tools.

1.7 Copy-and-Paste Library of Illustrations & Articles

A library of over 150 Banzai resources—articles and illustrations—that you can copy and use in your institution's website, social media campaigns, blog posts, newsletters, and more. This library is located on the homepage of your Manager:

Copy, revise, and paste as you see fit! Our copy-and-paste library is designed to help improve your own site's SEO by hitting relevant keywords.

Why it helps your business:

Rapidly build a content footprint with vetted, on-brand articles and visuals that hit relevant keywords. Use canonical or attribution links to protect and improve SEO while benefiting from your Wellness Center's authority.

1.8 On-Site Lead Generation with Clickable Calls to Action

Add clickable CTAs to any resource to promote financial products, services, or information. Leads are automatically emailed to your team and recorded in the **Banzai Manager**. You can create custom CTAs or have your Banzai rep activate default options.

Why it helps your business:

Turn education into action. Contextual CTAs capture qualified leads at the exact moment of interest and flow straight to your team and reporting.

1.9 In-Activity Product Promotion Popups

Use Offers to promote products or services to users completing Banzai courses or Coaches. Offers appear as pop-ups or external links, directing users to forms, PDFs, or web pages. Your Banzai rep can provide a planning guide to help you map out offers across your site.

Offer Outcome Options:

Offers can appear as either a pop-up with text or an external link, directing users to forms, PDFs, web pages, and more.

Why it helps your business:

Promote the right product at the right time (e.g., HELOC during a homebuying coach). This contextual relevance boosts conversions without feeling intrusive.

1.10 Rewards to Incentivize Engagement

The Rewards feature allows you to offer incentives to users who complete any Banzai resource you choose—articles, calculators, courses, or Coaches. Banzai can add and take Rewards down as often as our partners want us to—yearly, quarterly, monthly, etc.

Rewards are tracked in the Manager under "Direct Reports." There, you can view progress and completion for each Reward.

Why it helps your business:

Gamified incentives lift completion rates, increase time-on-site, and give you promotable milestones you can share in emails, social, and PR.

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2. School Features at a Glance

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2.1 Accessible Curriculum

Not only does our curriculum comply with state privacy policy, it offers multiple forms of accessibility. They can be used without a mouse, are screen reader capable, have high contrast colors, and are able to be accessed in over up to 20 languages.

Why it helps your business:

Inclusive access broadens reach across your community, aligns with CRA/CDFI objectives, and demonstrates value-driven leadership.

2.2 In-Person + Virtual Presentations

Access kid-friendly, ready-made presentations and handouts on essential financial topics like budgeting, saving, credit, and debt.

As a school community partner, Banzai encourages teachers to request presentations directly from your institution. When a request comes in, simply use the provided slides and presenter notes to deliver an engaging, financial-focused session — no prep required.

By leading these sessions, you position your institution as a trusted resource, giving students a reliable place to turn for future financial questions and needs.

Why it helps your business:

Deepens relationships with educators and families, building trust with tomorrow's account holders today.

2.3 Easy Teacher Communication

Streamline teacher communication by responding or initiating contact with customizable, dropdown, email templates ready for you in your dashboard.

Why it helps your business:

Template-driven outreach saves staff time, shortens response cycles, and keeps your institution top-of-mind.

2.4 School Usage Reporting

Find detailed reporting anytime.

- View a list of all the teachers you sponsor.
- Track statistics and order history for the workbooks your teachers have requested.
- Review and respond to presentation requests directly.
- Read teacher notes and approved student feedback about the Banzai program.

Each reporting page allows you to export data as a CSV file, making it easy to create reports, build charts, or develop targeted campaigns and improvement plans based on insights.

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Why it helps your business:

Exportable data makes it simple to quantify impact, brief executives, and refine outreach plans by school/teacher.

2.5 Continuous Expansion

Your library stays current with new resources added each year, keeping your program fresh and relevant.

As evidence of this, in 2020 when we had only 3 flagship games for students, since then, we've increased our content library by 1300% with now 43 games as of September 2025 and even more printable and digital additions including youth-focused articles, new workbooks, and expanded topics.

Why it helps your business:

A growing content library keeps your program fresh year-round, creating ongoing reasons to revisit and re-engage.

2.6 Teacher Development

Banzai goes beyond supporting student learning, we also help you become a key partner in educators' professional growth. Each month, we host two webinars—one live and one on-demand—featuring our curriculum team and inspiring teacher keynotes.

These sessions provide practical strategies to help teachers get the most out of the Banzai learning program, boosting adoption and expanding its impact across your community.

Why it helps your business:

Your brand is associated with high-quality PD—earning goodwill and long-term loyalty among educators.

2.7 Omnipresent Branding

Your logo and brand are embedded throughout student and teacher interfaces, workbooks, and even in-game avatars.

Why it helps your business:

Consistent exposure across student and teacher touchpoints cements brand recall.

2.8 Teacher & Student Feedback

Built-in features for direct feedback, comments, and appreciation from both teachers and students—so they know you are the one providing these free resources.

Why it helps your business:

Social proof you can share with boards, regulators, and the community; insights to improve future programming.

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3. What Your Partnership Includes

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3.1 The Manager: Analytics & Usage Dashboards

The Banzai Manager is a dashboard built for our partners to access all the reporting features our product has to offer. In it, you'll find specifics on your institution's reach within their community. Some of its features include:

Data-Driven Insights:

Tailor your institution's products and offers to meet specific needs within a community based on data tracked in the Manager while also discovering which of your Banzai resources gets the most engagement. This data can help you navigate and plan outreach efforts effectively.

Customer Usage Insights:

Gone are the days of navigating in the dark. With the Banzai Manager, you can access detailed usage statistics to gain valuable insights into how Banzai's resources are being utilized.

Manager Toolkit:

We've thoughtfully integrated links to a Manager Toolkit throughout parts of the Banzai Manager. This toolkit is a one-stop shop that contains tools including content marketing solutions, downloadable and printable resources, and other helpful guides.

Copy-and-Paste Library:

Includes over 150 Banzai articles and hero illustrations for you to copy and use on your institution's website.

3.2 The Toolkit: Extensive Marketing and Support Collateral

The Manager Toolkit is a powerful resource for both retention and outreach efforts.

Need to promote your partnership with Banzai? We've got you covered. Visiting a classroom and need something to share? The Toolkit has that too. Here's a quick look at the treasures it holds:

Marketing Materials:

Access a wide range of marketing materials—from trifolds and flyers to ready-to-use social media templates and presentations—perfect for promoting your partnership on the fly.

Embedded Content Guides:

One of the biggest perks of Direct is the ability to embed Banzai resources directly on your site. These tools automatically match your branding, keep users engaged without leaving your page, and even boost your site's SEO (Search Engine Optimization).

Presentations:

Ready-to-present materials for in-person or virtual sessions on topics like credit, homebuying, and budgeting. With handout, sample agendas, and presenter notes.

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3.3 Content Strategy & Marketing Support

Banzai provides tools to help your team promote your Wellness Center and engage your community.

Marketing Kits

Ready-made kits with email templates, graphics, and copy for social media and email campaigns. A marketing calendar is also included to spark ideas for future outreach.

Printable Outreach Flyers

Flyers to promote your Wellness Center in-branch, at events, or through local partners.

Course and Coach Trifolds

Trifolds that highlight Banzai Courses and Coaches, giving your audience a clear overview of available resources.

3.4 Dedicated Partner Success Representative

From kickoff to growth, a dedicated Banzai specialist helps coordinate strategy, answer questions, and relay feedback.

During onboarding, your success representative gathers key details such as brand colors, logos, and customization preferences, then handles getting your program up and running.

These specialists are experts at maintaining your microsites, keeping them aligned with your brand, and pulling reports for CRA qualifiers as needed.

3.5 New Content Added Quarterly

Your library stays current with new resources added each year, keeping your program fresh and relevant.

For the community product, we're regularly updating the product to include timely Coaches, articles, and calculators that will best address your account holder's needs.

3.6 400+ resources available in more than 10 languages

Accessibility and inclusion are among the most important aspects of financial education, and that means providing resources for individuals who may not be as comfortable with English as others.

We're proud to share that our library of 200+ school resources, along with our community-facing content, is available in more than 10 languages—and growing. Here is a list of some of our top language options:

1. English
2. Spanish
3. French
4. Chinese
5. Tagalog
6. Vietnamese
7. Haitian Creole
8. Portuguese
9. Arabic
10. Hmong
11. Korean

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