

## GROW CUSTOMER ENGAGEMENT

# Recommendation Themes for Personal Finance Companies

Connect customers with relevant products based on their individual interests, including stated preferences, inferred affinities, and previous browsing behaviors. The SmartHub CDP does the heavy lifting in collecting and activating customer data to personalize content while maintaining a seamless brand experience. Blueshift customer ClearScore automated **70%** of their campaigns with 1:1 recommendations (2019).



## Apply for Loan

Help support your customers' financial health by recommending the loan or debt relief that helps meet their goals.



## Apply for Card

Target customers with credit card applications that are relevant to their financial goals based on previous behavior.



## Finish Application

Encourage your customers to finish an application they started by sending personalized reminders.



## Discover Benefits

Highlight the benefits and rewards of using your financial products to your customers.



## Start Investing

Support the financial future of your customers by providing tips for getting started with investments.



## Continue Investing

Once your customers have enrolled in a savings plan, remind them to continue investing.

The best recommendation theme to use will depend on a particular customer's stage in their personal finance journey. Ready to start implementing personalized recommendations for customers that drive revenue for your brand? [Schedule a demo](#) with one of our SmartHub CDP experts to learn more.