

ACTIVATE AND GROW CUSTOMERS

5 Essential Omnichannel Campaigns for Personal Finance Companies



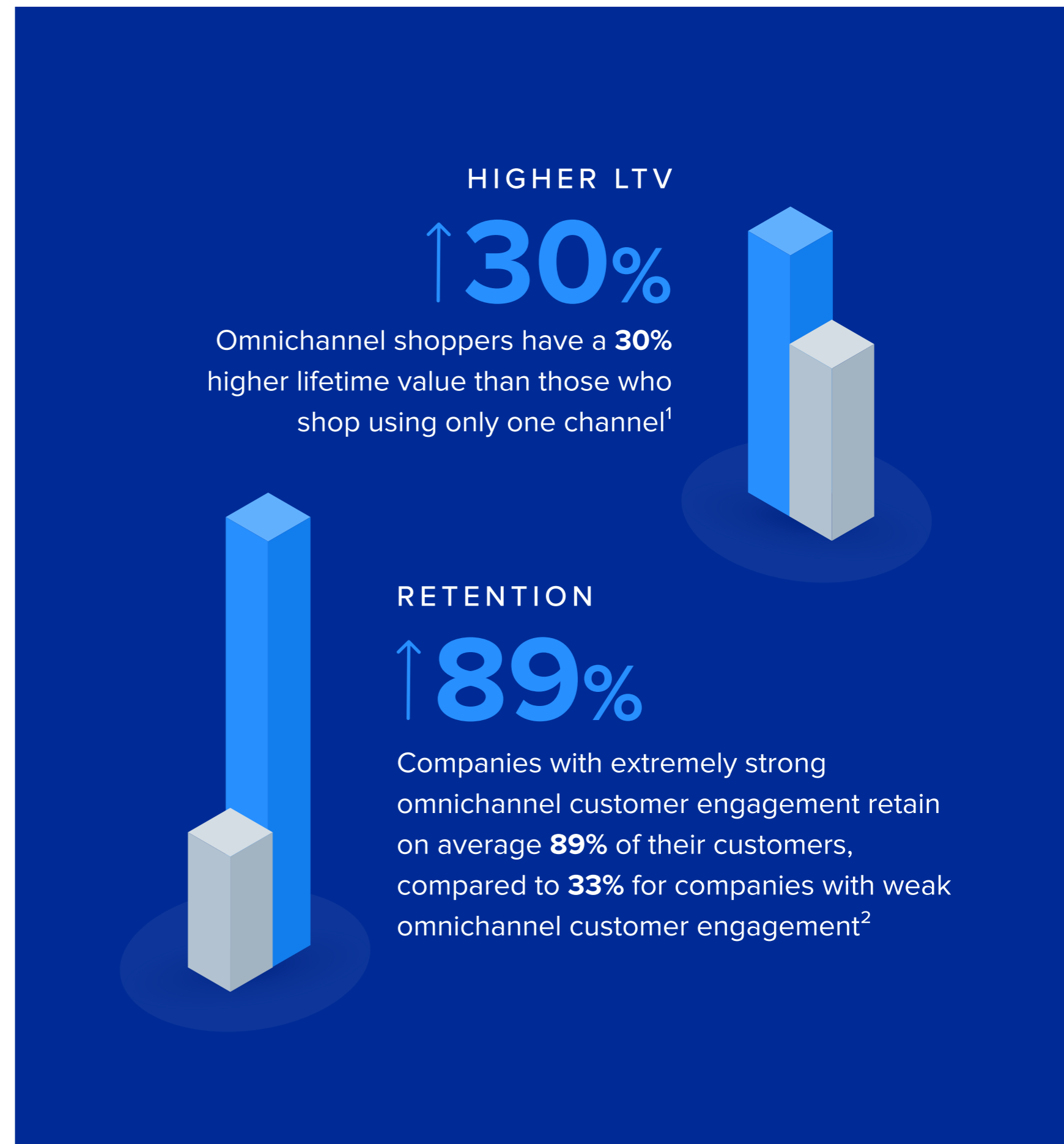
RELEVANT CONNECTED ENGAGEMENT

The Growing Importance of Omnichannel Marketing

Marketing campaigns have traditionally been planned at the channel level on a campaign-by-campaign basis. Each channel leveraged its own data to optimize performance for that specific channel without taking into consideration how those channel messages impacted the greater customer experience. It's not that marketers didn't want to take a holistic approach; they were just responsible for a specific channel and lacked the tools to integrate data and experiences across channels.

As marketers started engaging customers across the growing number of channels, their approaches remained channel-centric. Interactions on one channel were disconnected from messages on others. Each channel was unaware of events or interactions taking place on other channels, resulting in conflicting messages to customers.

¹Google (2015) Omnichannel shoppers: An emerging retail reality;
²Digital Commerce 360 (2013) Why an omnichannel strategy matters



BECOME A TRUSTED ADVISOR

Personal Finance Omnichannel Campaigns

Since customers are only in-market for new financial products infrequently, competition is fierce with competitors inundating the same customers with offers. Adding to the challenge, the long runway to cross-sells creates breaks in engagement and results in wasted marketing spend to reacquire customers.

It's especially important for personal finance marketers to not only create campaigns focused on driving leads and converting customers, but also to build an ongoing relationship as a trusted financial advisor who guides customers to make the best choices throughout their financial life stages. That includes creating educational, evergreen content to help customers improve their credit scores, find additional savings, and help them make smarter financial choices that help them reach their goals faster.



PERSONAL FINANCE PLATFORM

Grows Customer Engagement with Intentional Lifecycle Journeys

“Every company has data, but if you can’t action off that data instantly, then it doesn’t do you any good. And when dealing in financial products...you better get it right. The magic with Blueshift is its agility and ability to handle data for segmentation, journeys, and personalization across all channels, no matter the speed or attributes that we put in. We have the flexibility to use our data to improve results across many different use cases.”



Joyce Poole

Sr. Director, Marketing CRM, LendingTree

5 ESSENTIAL

Personal Finance Campaigns

1 Multi-Touch Welcome Campaign

Use customer behaviors and their financial profile to tailor the messages within the welcome series to what's most relevant for each customer's financial objectives.

2 Weekly Educational Newsletter

Continue to provide ongoing value and deepen relationships by delivering regular content and tools to help them reach their financial goals.

3 Reactivation Series

Reengage inactive customers with content tailored to their financial lifestage, stated financial goals, and/or what they are likely to be in-market for next.

4 Cross-Sell Campaign

Drive customers to their next purchase by utilizing past purchase history, browsing behavior, lifestage, and insight into what similar customers purchased.

5 Abandoned Action Campaign

Set up campaigns that automatically trigger when a drop-off in the buying process takes place and make it easy for customers to pick up where they left off.



STRENGTHEN YOUR OMNICHANNEL STRATEGY

The Future of Customer Engagement

As personal finance marketers shift from a channel-centric approach to customer-centric omnichannel experiences, get ahead of the pack by structuring your campaigns throughout the lifecycle around an omnichannel marketing strategy. Make sure you're targeting customers on the most relevant channels.

Key Takeaways

As you incorporate omnichannel campaigns throughout customer journeys, keep in mind:

- You'll need the right tool to activate your data and deploy meaningful omnichannel customer experiences, like the SmartHub CDP.
- As the number of marketing channels grows and customer expectations evolve, your personal finance company must continue to anticipate and be responsive to their needs.

Your journey to creating valuable customer experiences starts here. Connect with one of our omnichannel marketing experts today to schedule a demo and learn more.

SCHEDULE DEMO

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