

PAVING THE WAY

for Sales Success in the Financial Services Industry



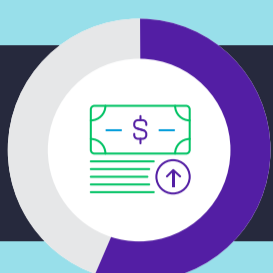
Do strict rules and ever-changing regulations have you struggling to create impactful, up-to-the-minute content and distribute it in a purposeful way? Are you finding it difficult to differentiate yourself in an over-saturated market?

Using digital best practices to align sales, marketing, and compliance can help you prioritize the client experience and set yourself apart from your competition.

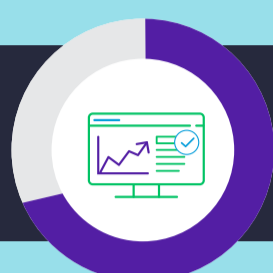
Finance Marketers' Primary Focus Areas:



78% want the optimization of their customer journey¹



55% want an increasing investment in personalization¹



70% say consistency is "very important" to digital marketing¹



53% want an increasing investment in marketing analytics¹

Predictive Analytics

Predictive Analytics use data mining, algorithms, and machine learning to analyze existing data, recognize patterns, and make predictions about future events or actions.

- 1) Identify your target audience
- 2) Gather meaningful data from profiles, history and behavior
- 3) Make behavioral predictions based on existing data and patterns
- 4) Drive revenue by focusing your agents and advisors on the highest quality leads



13% want reduced time-to-decision making with analytics²

Content Automation & Personalization

Ensure content can be updated and customized quickly and accurately and made easily accessible to your salesforce on-demand.

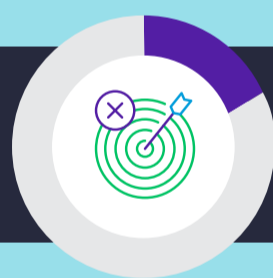
- 1) Create a centralized content repository that links back to your data feeds
- 2) Use dynamic content to give agents and advisors the flexibility they need to personalize information within the parameters of compliance
- 3) Provide a consistent and engaging client experience by ensuring brand consistency, customer-centricity and greatly reduced risk throughout the sales process



95% of buyers purchase from someone who gave them content at every buying stage³



65% of reps can't find content to send to prospects³



19% of reps avoid using content because it is outdated and not customizable³

Sales Engagement

Give agents and advisors the ability to quickly and easily access all compliant content (e.g. presentations, videos, interactive tools, etc.) to enable organic and meaningful client interactions.

- 1) Integrate your sales enablement platform and CRM to increase efficiency, measure effectiveness, and optimize content accordingly
- 2) Capture and act on real-time input from buyers, easily pivoting discussions to address relevant topics and enhance the quality of sales interactions
- 3) Measure and understand what content drives revenue so marketing can focus future efforts on whatever adds the most value from a sales perspective



74% of clients are more likely to buy if the sales rep pivots to focus on their agenda⁴

For more information or help getting started with the practices outlined above, contact us or request a demo.

Source:

- 1) Abramovich, Giselle. "15 Mind-Blowing Stats About Financial Services Marketing." CMO.com.
- 2) Kshirsagar, Mousami. "Predictive Analytics, a game changer for transaction banking." www.finextra.com
- 3) Rinaldo, Jordan. "20 Sales Enablement Statistics You Can't Ignore." www.saleshub.ca
- 4) How B2B Sellers Win in the Age of the Customer, a commissioned study by Forrester Consulting on behalf of Mediafly



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