# Financial Services

As a financial services marketer, you face challenges while driving awareness and growth for your company in the face of strict compliance and regulatory guidelines. Personalizing prospect and existing customer experiences can help you optimize every interaction so you can:

- **Know your customer**–recognize anonymous visitors, returning prospects, and existing customers, then present meaningful information based on persona, past or present behavior, and trending activity on your site
- **Present relevant content & offers**–use real-time behavior segmentation of personas and analytics to dynamically serve only the offers or content that are relevant to each visitor
- **Expand wallet share**–promote offers, products, or services based on customer intent and each customer's current business relationship with your organization
- **Connect across channels**–deliver personalized experiences throughout each customer's journey, seamlessly connected across all channels and devices— web to tablet to phone – driving a consistent experience in each visitor's channel of choice
- **Drive long-term relationships**–capture visitor insights then respond with personalized content, advice, suggestions, support tips, or offers, providing a current value-added experience during each and every visit

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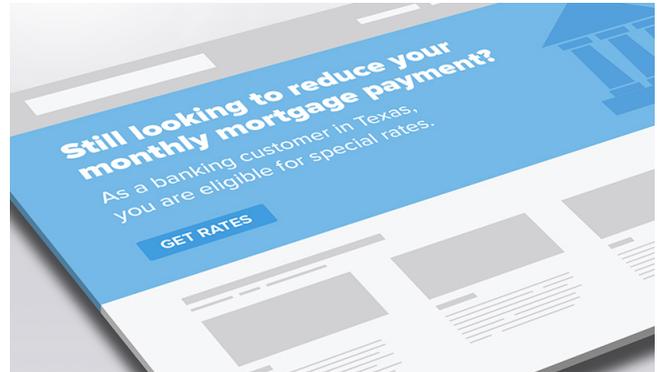
How to use these articles

The following articles offer best practices for using Evergage to optimize the experience for your site visitors and increase conversion rates

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Goal	Playbook
Know Your Customer	103 - Personalize homepage for different personas
	271 - Call out new app features
	174 - Surface recently viewed financial products
Present Relevant Content & Offers	178 - Target visitors based on industry or company name
	192 - Target products based on geography and season
	174 - Surface recently viewed financial products
	172 - Include similar products based on collaborative filtering
	263 - Continue application forms after initial abandonment
	272 - Display system maintenance or outage message
Expand Wallet Share	239 - Announce a new product launch
	370 - Drive content and product discovery with trending recommendations
	371 - Drive content and product discovery with similar items recommendations
	170 - Target specific content based on customer intent
	171 - Cross sell product(s) to loyal or returning customers
Connect Across Channels	161 - Continue the conversation from an email campaign
	173 - Carryover message for customer showing intent

Drive Long-term Relationships	273 - End to end personalization by customer intent
	238 - Introduce helpful tips to drive customer success
	167 - Net Promoter Score (monitor, engage, learn)
	1710 - Serve a quick and focused event-based survey
	165 - Reduce support calls
On-boarding	372 - Introduce helpful tips to drive completion