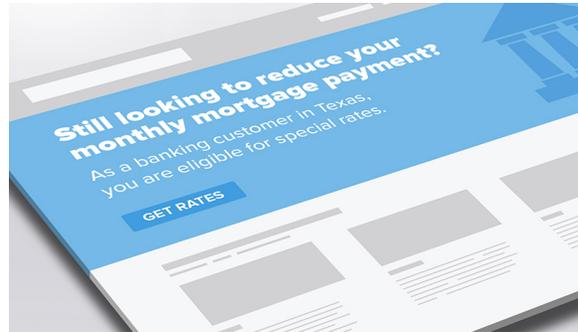


Financial Services



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



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

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