



The Ultimate Guide to
**Financial Services
Marketing**





Financial services marketing

shares the same goals as many other industries: reach new customers, establish trust, and nurture lasting relationships.

But the landscape in financial services marketing is changing. Between the covid-19 pandemic, the arrival of digital-native disruptors, and evolving regulations, the way consumers choose and interact with banks, insurance providers, and wealth managers has shifted significantly in the last few years.

So let's take a deep dive into the current landscape of financial services marketing.

How are leading brands attracting and retaining customers in the digital age?

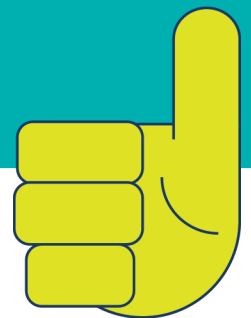


Table of Contents

- 04** What is Financial Services Marketing?
- 05** How to Identify Your Target Audience for Financial Marketing
- 06** Deciding on the Best Marketing Channels for Your Financial Services Organization
- 12** How to Set Goals and Identify Key Performance Indicators
- 15** How to Evaluate Your Financial Services Marketing Content
- 17** Personalizing Financial Services Marketing with Segmented Customer Journeys
- 18** Financial Services Marketing Trends
- 19** Launching Your Financial Services Marketing Strategy



An illustration of two people, a woman in a teal shirt and a man in a red shirt, standing in front of a whiteboard. The whiteboard displays various charts, including a line graph, a grid, and a profile card. There are also gears and a plus sign floating around the whiteboard. The background is a mix of yellow and blue.

What is Financial Services Marketing?

Financial services marketing is simply marketing in the financial industry.

Depending on the products and services their companies offer, financial services marketers work to drive new accounts or memberships, increase deposits, sell insurance policies, or promote wealth management or [advisory services](#).

One challenge all financial institutions share: their work is [highly regulated](#) and often scrutinized by legal and compliance teams. Campaigns and content need to comply with legal expectations like fair lending laws, follow guidelines from oversight organizations, and/or include proper disclosures and statements. Staying compliant can affect everything from how you target ads on digital platforms to the way your emails or other messages can be delivered. That's why [financial services](#) marketers often work in close collaboration with their colleagues on the legal team, and need to build approval processes into every workflow.

Types of Organizations That Use Financial Services Marketing

Companies that employ financial services marketers include:

-  Commercial banks
-  Regional banks
-  Credit unions
-  Insurance agencies
-  Wealth managers
-  Financial advisors

How to Identify Your Target Audience for Financial Marketing

Good marketing is built on a foundation of identifying and understanding your audience. By having a clear picture of who you're trying to reach and what their needs are, you can create content and campaigns that will resonate, make a lasting impression, and ultimately drive conversions.

By breaking your overall audience down into target segments, you can begin to tailor experiences that will be more relevant and drive greater results. Some key factors to understand about your target audience include:



Demographics

Are you targeting men or women? Millennials or baby boomers? Large families or single professionals? Small business owners or employees with a traditional retirement plan? High earners or budget-conscious individuals?

Geography

Are you targeting a nationwide audience or households within specific zip codes or blanket regions, like rural or urban?

Psychography

Are you targeting individuals with specific interests, such as saving for retirement or getting started with basic banking? Do you want to reach traditionally conservative investors or crypto-obsessed early adopters?



As you answer these questions, you can build out specific audience segments and even drill down into [customer personas](#), which describe an idealized customer you want to reach. Personas include information about who your audience member is and what motivates them, which will help you design experiences to address their needs and answer their questions.

Articulating and documenting your target audience is a group effort. Involve teams across sales, customer support, and product (especially for fintech companies) to inform your research and build alignment. Also include your legal team to ensure you're accounting for any [nondiscrimination](#) and fair lending laws that may impact your marketing strategy.



Standout Financial Services Brand That Knows Its Audience: Ellevest


[Ellevest](#) is a fintech platform that uses robo-advisors to help its members manage their investments. The brand has grown rapidly (both in customer count and funding rounds) by remaining hyper-focused on a target audience that's been historically underserved in its industry: women. Across every channel, [Ellevest serves up messaging](#) and content intended to help women improve their financial literacy and build an investment portfolio. From [financial astrology memes](#) to compensation [negotiation tips](#), Ellevest marketers demonstrate a clear understanding of who their target audience is and how to communicate with them.

Deciding on the Best Marketing Channels for Your Financial Services Organization

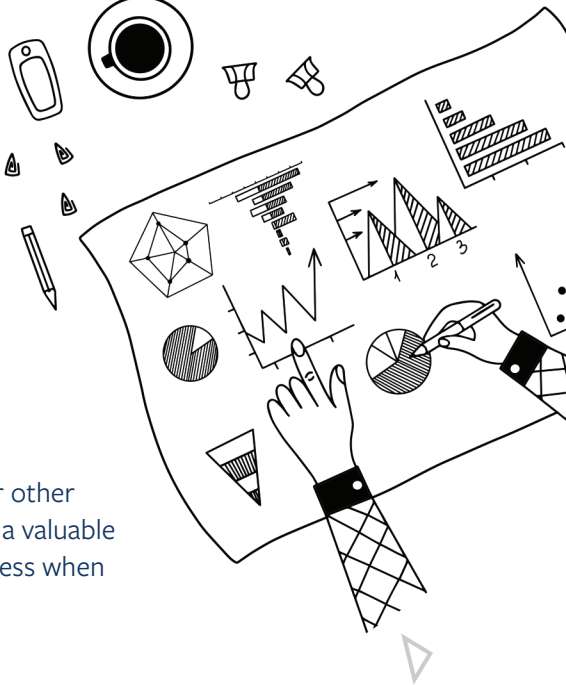
Once you understand who your target audience is, you can zero in on where they spend time online and target the right channels to help you reach them.

Content Marketing

Content marketing is a broad approach that uses articles, videos, podcasts, or other resources to educate and connect with your audience. This channel presents a valuable opportunity to reach people early in their research and decision-making process when they're looking for new financial products or services. Plus, it's a channel you own and collect data from first-hand.



Google reports that over half of online investors don't have a brand in mind when they start looking for financial resources online (using search terms like "what should I invest in"), and that 86% of potential investors spend more than an hour researching online.



At this early stage, financial services marketing teams can make a sizable impact on brand trust. For many financial brands, trust is a significant concern: [less than half](#) of US banking consumers believe large brands are trustworthy, and most consumers don't [feel any more or less trusting](#) of newer fintech offerings. By focusing on helping customers rather than selling to them through content, you have the chance to establish trust early in the relationship.

Just make sure your helpful content includes clear CTAs that guide your visitors further along their buyer's journey, such as signing up for your newsletter, downloading a gated guide, subscribing to your YouTube channel, or simply reading another relevant blog post. These actions make your original content worth the effort, because it draws strangers in and helps them to become known leads that you can then nurture and qualify.

Standout Financial Services Brands in Content Marketing

Canadian-based investment service WealthSimple publishes a slick digital magazine tackling tough subjects like [the racial wealth gap](#)

Wealthsimple

Bank of America maintains an extensive resource library titled [Better Money Habits](#) that delivers relevant articles based on a visitor's self-described financial state

BANK OF AMERICA

Content Marketing Metrics

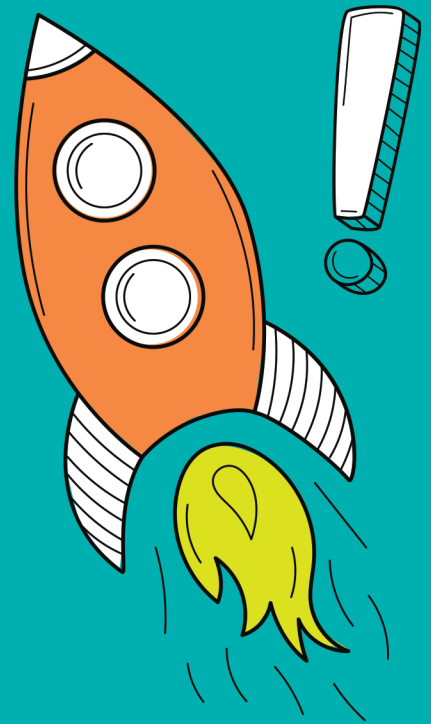
Website traffic, newsletter signups, content downloads

Organic Search & SEO

Search engine optimization (SEO) is simply publishing content on your website that answers questions your audience members are actively searching for online.

If you're already investing in content marketing, SEO is a natural next step to make the most of the assets you're already creating. Tools like [SEMRush](#) or [Ahrefs](#) can help you identify the terms people may be searching for, so you can then optimize your titles, headers, and meta descriptions on your existing content to include those relevant keywords.

If you're just starting out with content marketing, SEO can also help you understand what topics will be most relevant to your audience. You can use the same SEO tools to conduct keyword research and find out what people are already searching for, then follow the same optimization best practices to create new content that will help meet those needs.



SEO for financial services

can get a lot more complicated, especially since the industry's top keywords can be fiercely competitive, but following basic best practices can help you make the most of content by capturing organic search demand (especially for targeted [long-tail keywords](#) that are particularly relevant to your audience).

Standout Financial Services Brands in SEO

Fintech brand NerdWallet has an unfair advantage since it began as a content site, but remains a classic [case study in SEO for financial services](#)

N nerdwallet™

Washington, D.C.-based Dream Financial Planning uses organic search to reach its target audience of minorities and young professionals [with tailored financial content](#) (proving you don't have to be a massive brand to succeed with SEO)



SEO Metrics

Website traffic, leads such as newsletter opt-ins or form fills, phone calls (because research suggests organic search drives [64% of calls](#) to financial services providers), time-on-page, bounce rate











Organic Social Media

Social media is the perfect platform to connect and continue a relationship with your audience on the channels where they likely already spend a lot of time. Research shows that [72% of American adults](#) use some type of social media for an average of [147 minutes per day](#).




Financial services marketers can use social media to share content, answer questions, and give customers a sneak peek behind the scenes with posts about employee appreciation or giving back. All these activities can help build brand trust and awareness, as well as drive website traffic and leads.

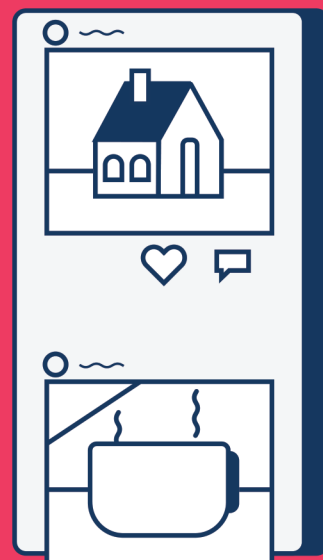
Of course, you want to choose the right social media channels for your business. Data from [Pew Research](#) can help you narrow in on the platforms that your target audience loves most:

-  **YouTube** is the most popular channel overall, used by 81% of adults
-  **Facebook** is a close second, especially with older demographics (used by 77% of adults 30-49, 73% of adults 50-64, and 70% of 18-29)
-  **Instagram** is used by 71% of adults 18-29 and 48% of 30-29
-  **Snapchat** is widely used by Millennials and Gen Z (65% of 18-29), with **TikTok** quickly growing in popularity with these age groups (48%)
-  **LinkedIn** is a useful platform to reach higher-income customers, as it's used by 50% of college graduates and those earning over \$75k



And yes, you will need to enlist your marketing team to help field support requests and answer questions that followers will inevitably share in the comments of your posts. Customer support needs are the norm on social media, but responding promptly and helpfully gives your brand the chance to demonstrate empathy and customer care.

-  **TD Bank** keeps its sizable Facebook following engaged by posting holiday messages, sharing [links to timely articles](#), and supporting seasonal campaigns
-  **Citizens Bank** used social media to share and promote a [minority-owned small business grant program](#) in 2020 that drew more than 22,000 entries in a week and generated more than 1 million views
-  Mobile banking brand **Chime** gets enviable engagement numbers on Instagram by posting [shareable memes](#) and [comment-driven posts](#), and drives traffic by promoting how-to content like its [Ultimate Tax Preparation Checklist](#)



SEO Metrics

Shares, comments, likes, follows/subscribes, website traffic

Paid Digital Advertising

Finance marketing is expensive with the average cost per lead estimated to be \$62.80. Paid search results through Google Ads and online advertising, such as the Google Display Network, also net decent conversion rates of 5.10% and 1.19% for finance and insurance, respectively.

That's why paid ads remain popular among Fortune 500 financial services companies. Out of the top 30 companies with highest paid search, eight are insurance and financial services, and the U.S. financial services industry is the second-highest spender in digital advertising, behind only retail.

These leads are expensive, but for companies with sizable budgets, it's a proven acquisition tactic and effective way to amplify the reach of your content and campaigns.

Paid Ads Metrics

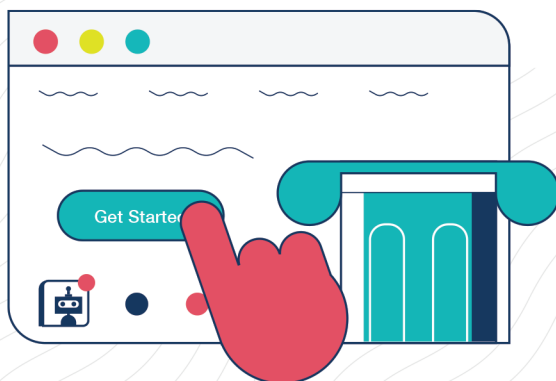
Cost per acquisition, cost per click, cost per impression

Webinars and Online Events

Webinars and online educational events are another way to share helpful insights and answer questions during post-presentation Q&As. Repurpose content you've already created for eBooks or guides into a slide deck to use during a webinar.

Most brands require webinar guests to register with their name and email (at minimum) so marketers can send targeted messages before and after the event. To drive more engagement, encourage guests to visit a dedicated landing page to download your guide or sign up for a relevant product or service you've discussed during the webinar.

As an alternative to hosting your own events, you could pitch company leaders to be guest panelists on webinars in areas of their expertise. Then, make sure you have a fabulous follow up offer to draw the partner's audience into your funnel.



Webinar Metrics

Signups, attendance, landing page traffic, post-event email engagement

One way to make the most of your ad dollars is by sending traffic to dedicated landing pages with adaptive forms that use progressive profiling to gather new information every time a prospect or customer completes a new form.

Standout Financial Services Companies Hosting Webinars

US Bank publishes every video recording of its live webinar series on financial wellness in a browsable library



North Carolina-based Coastal Wealth Management hosts live webinars on topics its mature audience cares about (like retirement planning, Medicare, and tax-advantaged college funds), and publishes the recordings on its website



Influencer Marketing

Partnering with experts your audience already knows can be an effective way to gain trust and awareness. Especially given the meteoric rise of “[fin-fluencers](#)” on Instagram and other social media channels, these partnerships can unlock access to a significant new audience.

That said, financial services marketers do need to stay on top of the latest [disclosure requirements by the FTC](#) and [FINRA](#) restrictions that may bar influencers from recommending specific mutual funds or stocks. And brands should be aware that [TikTok has especially tight restrictions](#) on promoting investment-related content on its platform. Get your legal team involved sooner rather than later on these campaigns.

If you pursue influencer marketing, the key is finding and securing the right individual to reach a precisely targeted audience most likely to be interested in your products or services. You’re better off finding a partner with an engaged, active following that overlaps with your target audience than simply looking at overall follower counts. Relevance trumps total reach when it comes to actually driving leads and getting ROI from influencer marketing.



Here are a few examples of top financial influencers and their audiences:

Daniella of [I Like to Dabble](#) publishes content on side hustles and financial security for the LGBTQ+ community



[Delyanne the Money Coach](#) shares retirement savings tips with new investors, especially women



Dasha Kennedy, aka [The Broke Black Girl](#), tailors her financial education posts to women of color on Instagram and manages the vibrant Broke Black Girl Facebook community






Jeremy Schneider of [PersonalFinanceClub](#) shares infographics and videos that explain investment basics to newcomers



Note that social media isn't the only option for influencer partnerships. Sponsoring blog posts or affiliate links is another way to engage influencers, and these tactics may show longer-term results than social media-only campaigns. And, of course, you don't need to focus only on influencers specializing in financial literacy. Just make sure your partner's audience overlaps with your own.

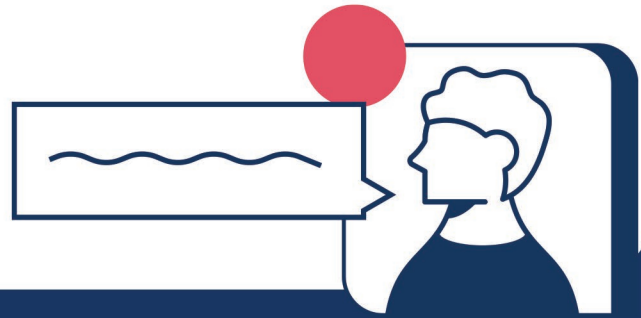


Standout Financial Services Brands Partnering With Influencers

-  Fintech brand **Current** has a long-term content partnership with massively popular YouTuber [MrBeast](#), who has a history of giving away money to his fans while promoting the Current app
-  Brokerage firm **Fidelity** partners with influencers to put a human face on their investment services
-  Student loan provider **SoFi** engages with influencers to tell stories of becoming debt-free, such as a [nursing influencer](#) who has a sizable following in the medical field

Influencer Marketing Metrics

Traffic to trackable links, social media followers, post engagement



Email Marketing

Email marketing has a distinct advantage, because it allows you to communicate directly with your audience, rather than depending on another platform or partner to connect you. No algorithm updates or ad spend budget will impact your ability to reach your customers with email.

Like social and paid ads, email can be used to amplify your content marketing efforts and move customers further along their buyer's journey. Visitors to your website can sign up for a newsletter where you share your latest articles or high-value content.

Email is incredibly useful for [lifecycle marketing and nurture campaigns](#). You can use this channel to upsell, solicit referrals, or drive retention through ongoing education. And with email marketing automation, you can create repeatable campaigns and sequences that will guide your subscribers through the buyer's journey.



Email Marketing Metrics

Clickthrough rates, unsubscribe rates, engagement metrics (note that open rates are now less reliable for Apple device users)

Standout Financial Services Brands Using Email Marketing

Interior Federal Credit Union set up an [email onboarding program](#) for new members that saw impressive metrics like a 31% open rate and first-year retention rates of 98%



INTERIOR FEDERAL CREDIT UNION
Your Natural Resource for Financial Services

When customers hit milestones towards savings goals, **Ally Bank** shares celebratory messages with links to [relevant articles](#)

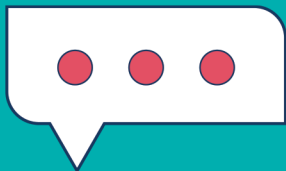


Omnichannel Marketing

Choosing the right channels to reach your target audience is an important step, but for the most effective marketing strategy, you need to tie it all together with coordinated campaigns that tell a cohesive story.

For example, you may launch a brand awareness campaign built around educating a Gen Z audience on budgeting. That could include hosting a webinar on budgeting with an influencer panelist who will help promote the event on their own social media channels. Registrants are enrolled in an email marketing campaign that shares more relevant content about budgeting. Meanwhile you deploy paid ads to promote your downloadable guide to budgeting for new college graduates, and eventually funnel your new audience members to a landing page offering an online savings account for twenty somethings.

Omnichannel is all about the whole becoming greater than the sum of its parts, and reaching your audience with consistent messages in the right place at the right time.



Omnichannel Metrics

Traffic by source, conversions at every touchpoint



How to Set Goals and Identify Key Performance Indicators

Setting goals and measuring performance helps inform what's working and what's not, and gives you valuable insight into where to invest marketing resources. While tracking big-picture metrics like revenue, ROI, and overall customer acquisition is a given for most financial services revenue teams, that's not enough.

Tie the metrics you track to the business goals you're working on every quarter (or year, or month, depending on the size of your organization and how quickly priorities tend to shift). Start by identifying your overall business goals, and then narrowing in on the metrics that will help you measure the effectiveness of your marketing activities.

Once you have your high-level goals documented, you can evaluate the specific Key Performance Indicators (KPIs) that are the most relevant to what you're trying to accomplish through marketing in the financial sector.

For example:

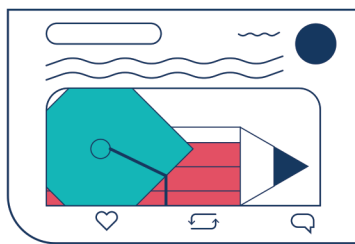
- Depending on what you're up to, your goals might focus on building **brand awareness**, **lead generation**, or generating qualified **pipeline** for your sales team.
- If your company is launching a major new offering next quarter, you may choose to focus on **upselling** and **securing new sign-ups** or deposits for a specific product line.
- If you are having issues with attrition, customer retention and building **brand loyalty** will likely be at the top of your to-do list.

Brand Awareness KPIs for Financial Services Marketing

Direct website traffic and branded search volume: You can reference Google Analytics to look for changes in how many people are visiting your website directly by typing your URL in their browser, or by searching for your brand name before visiting your site. Spikes in these numbers can show the impact of offline campaigns like radio or TV, or PR efforts like funding announcements or new branch openings.

And over time, an increase in branded search volume indicates your overall brand awareness efforts are working, because more people are looking for your brand online.

- Social media follows:** Just like website traffic, you should see an increase in social media followers as your brand awareness increases.
- Brand mentions and social listening:** Many social listening tools offer tracking that monitors how frequently people are mentioning your brand online, across websites, blogs, and social media.
- Brand recall and recognition:** If you have the budget, investing in [brand tracking surveys](#) can help you keep your finger on the pulse of your brand awareness. By regularly checking on how many audience members remember your brand after an interaction (known as brand recall) or are aware of your brand (either totally unaided or aided with a prompt like your logo), you can monitor your brand awareness in a direct, quantifiable way.



Lead Generation KPIs

- Customer acquisition cost:** When you're investing resources in generating leads, you need to understand which channels are most effective. Tracking customer acquisition costs will help you see that picture clearly.
- Conversion rates:** Similarly, tracking conversion rates across your website, landing pages, and other digital assets helps you zero in on what's working and what's not. Looking at your own historic data will give you a nuanced understanding, but 2-5% is an average benchmark for website conversions.
- Phone calls:** For banking and investment customers, phone calls are still the most popular way to make a purchase. Use unique phone numbers for campaigns, set up click-to-call extensions on mobile ads, or use other tracking methods to tie calls back to specific marketing efforts.

Product or Service Launch KPIs

- Product-specific metrics:** These are straightforward: how many new accounts were opened? How many customers made additional deposits?
- Email click through rates:** If you use email to share a new product or service with existing customers, pay attention to click through rates to gauge the level of interest and effectiveness of your messages.
- Conversion rates:** Similar to the lead gen example above, track the conversion rates for your landing pages or content promoting the new service or offering.

Customer Retention KPIs

- Customer retention rate:** Obviously, you want to track your retention rate itself if churn is an issue. You can calculate this rate by the week, month, quarter, or year, but the basic metric is: number of customers at the end of the time period minus the number of new customers acquired during the time period divided by the number of customers at the start of the time period. Then multiply by 100 to get a percentage.
- Email engagement rates:** Measure if your existing customers are opening or clicking on links within your emails, as well as unsubscribes. If your customers aren't opening or engaging with the content you send directly to their inbox, that can indicate lagging interest and a disengaged relationship.
- Net Promoter Scores:** Tracking a customer experience metric like Net Promoter Score (NPS) can give you an idea of whether customer satisfaction is trending up or down. Ask open-ended follow-up questions to get more qualitative feedback on how you could improve your customer relationships.

$$\text{Retention rate} = \frac{((\text{NCE} - \text{NEW}) / \text{NCS}) \times 100}{}$$

Note:

Improving customer retention is rarely the domain of financial services marketing teams alone. Customer service and product teams can have an outside impact on customer experience, which will be the key driver of retention. But engaging customers between visits through content can help improve relationships and drive retention, so marketers should expect to get involved when retention becomes a company focus.

Setting KPIs for Any Finance Marketing Goal

These are just a few examples of goals and KPIs you may want to track. No matter what your goals, focus on keeping your KPIs relevant and specific to the tactics and the channels you'll use to achieve them.

Bottom line: your chosen metrics should be targeted enough that you can learn what's working, what's not, and take proactive steps to improve your marketing activities and reach your goals.



How to Evaluate Your Financial Services Marketing Content

As you build out a library of financial services content, you'll want to continually review what you've got and whether the assets you're creating are effective. Here are a few ways to evaluate your financial services marketing content:

Is Your Content Helpful and Relevant?

Your content should answer questions your audience is actually asking. Use keyword research, [Google Trends](#), comments on your social media accounts, and topics being covered by relevant influencers or even competitors to stay aware of what's top of mind for your audience members.

Pay attention to engagement metrics on social media. If people aren't commenting or sharing, it may not be very thought-provoking or helpful. And ensure you have plenty of useful tools and resources, not just sales-focused materials.

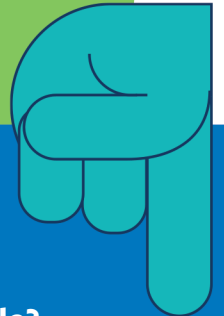
Is Your Content Robust?

Meaty topics in the financial services space tend to deserve meaty content. [Search Engine Journal reports](#) that the average word count for pages in the top three positions across the top 1000 banking terms is 1,240 words.



Is Your Content Optimized for Mobile?

If you care about user experience, this is crucial, because [mobile searches for financial-related inquiries](#) are growing. Google also uses mobile-first indexing to crawl and evaluate your site, so in order to rank well for organic search, you want your pages to be [mobile-friendly](#).



Does Your Content Have Good Engagement Metrics?

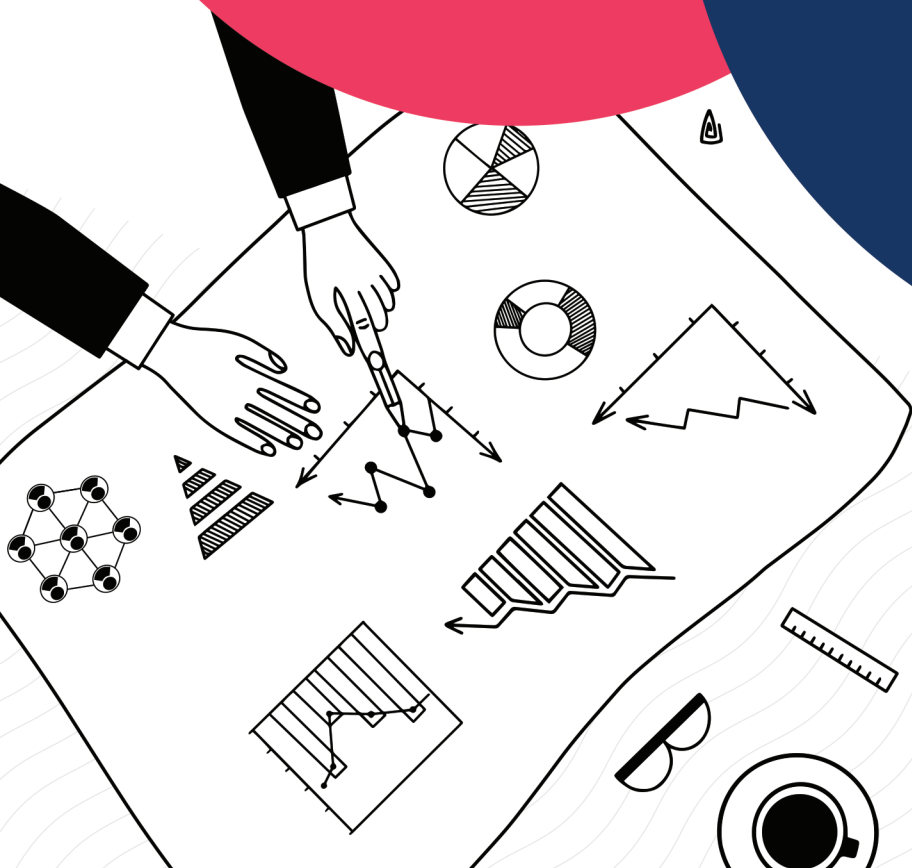
Evaluate organic traffic data like bounce rate and average time-on-page to get quantitative insights into which pages may be visited only briefly, then rejected by users. These pages may not match up with the intent of the keywords you're ranking for or may have user experience issues that make valuable visitors leave your site prematurely. Another way to ensure deeper engagement is to make sure you're offering the right CTAs and additional content for your visitors to click on.

Is Your Content Interactive?

Interactive content, like calculators, planners, and checklists, tend to drive high engagement. 96% of marketers surveyed believe that content interactivity impacts buyers' decisions. According to content efficacy research by DemandMetric, compared to passive content, interactive content is more likely to be effective at educating buyers and differentiating from competitors, and more likely to be shared frequently.

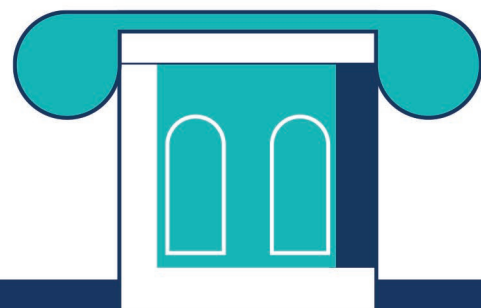
Do You Follow Consistent Guidelines for Content Governance?

As we've discussed, financial services marketers have to manage regulatory disclosures when offering new products, which can negatively impact customer experience by adding jargon or slowing down marketing teams due to internal approval processes. Following a consistent roadmap for content governance will help your team stay organized and on top of compliance requirements while producing content more efficiently.

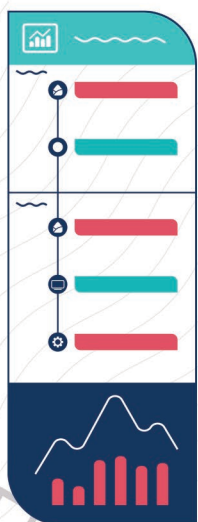


Personalizing Financial Services Marketing with Segmented Customer Journeys

No matter who your audience is or what channels you're prioritizing, personalization is key to meeting customer expectations. Meeting that demand requires smart marketing strategies executed on the right tools, but when you do, you'll move toward getting the best possible results from your marketing efforts.



- McKinsey reports that for consumer banks, “The biggest reason companies fail to capture the full benefits of their digital improvement efforts is that they concentrate on optimizing individual touchpoints rather than first tackling the customer experience as customers actually experience it - the complete journey that cuts across multiple functions and channels.”
- A recent survey of banking customers found that 72% of respondents rated personalization as “highly important”, and only 8% said it wasn't important at all. This holds true across Millennials (79%), Gen Z (75%), and Gen X (74%), with a slight dip for Baby Boomers (58%).
- For today's consumers, personalization means more than simply inserting a first name into an email. To meet these heightened expectations, financial services marketers need to adopt a customer journey-driven approach to personalization. This means targeting customers with the right message at the right time, based on data that tells you whether they're in the early stages of decision-making (awareness), evaluating your brand alongside different options (consideration), or ready to sign a contract (purchase).
- Personalization in financial services depends on successful segmentation and marketing automation, which allows you to tailor messages to audience members based on their interests or unique identifiers.



Building segments requires gathering data on your audience. Tracking user behavior on your website, landing pages, and emails can help you pinpoint where your customers are in their customer journey and deliver more relevant content at the precisely right time, such as after they've visited a product page or clicked through an email link to an educational article.

For example, Centra Credit Union used segmentation to target hyper-relevant members of their audience with an educational campaign on the benefits of opening a certificate. Using optimized content and data led to 35% email open rates, 470 new certificates, and \$10.5 million in new deposits over just seven weeks, with a single automated program.

Segmentation and automation can also help financial services marketers meet compliance regulations by ensuring pre-approved language is added to the necessary emails and syncing with a BCC archiving solution for easier storage.

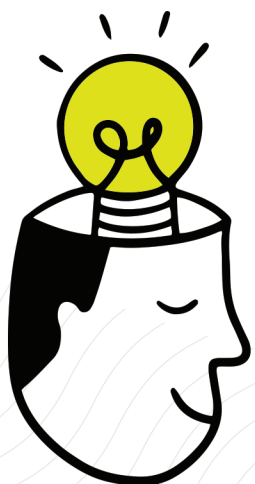
Financial Services Marketing Trends

Change is one of the few constants in marketing, and finance marketing has certainly seen its fair share. The interplay of new channels, disruptive competitors, evolving regulations, and [innovative tech](#) mean new best practices and experimental tactics are always coming to light. Here are a few of the financial services marketing trends to keep your eye on.

First-Party Data

Changes to consumer targeting are nothing new for financial services marketers, who recently had to adjust course after [Google introduced restrictions](#) on using demographic data to target ads for credit products and services in 2020.

Now, as tech giants like Google and Apple continue to implement new consumer privacy-friendly policies, financial institution marketing is pivoting again to focus on collecting and using [first-party data](#). This data is collected directly from consumers, rather than provided or purchased by third-party platforms, and can include website behavior, email engagement, event attendance, product use, and team interactions. Compiling and leveraging first-party data will continue to be a priority for financial services marketers as the privacy landscape continues to evolve, especially in regulated industries.



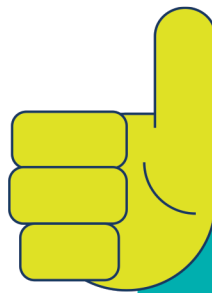
Voice Search

Voice-assisted search from Google, Amazon, and Apple is [on the rise](#), especially among smartphone users. This can impact the way you go about marketing financial products, including the need to optimize your [website for voice search](#). Indirect impacts come from adopting voice-enabled apps like Amazon Alexa.

AI and ML Tooling

Financial services marketing leaders point to artificial intelligence (AI) and machine learning (ML)-powered tools and services as an emerging focus. Some of these applications aren't new. As you know, website chatbots and dynamic ad bidding platforms powered by algorithms have become the norm for most marketers.

Deloitte points to new use cases where [AI can be integrated more fully](#), such as automatically surfacing insights about a customer's digital experience to the live representative they're speaking with over the phone. This kind of end-to-end embedding of data science and machine learning could help marketers achieve new levels of personalization across every touchpoint.



When customers are engaging with your brand through voice-assisted devices, you'll want to incorporate data about those interactions into your marketing plans, just as you would visits to a website or interactions with an online customer service chat.

Corporate Social Responsibility

Financial services companies have historically skewed low when it comes to consumer trust, but consumers are increasingly hungry to spend money with businesses that share their values. After watching how brands responded to the global pandemic, political upheaval, and social justice movements of the early 2020s, it's little surprise that an IBM [consumer research study](#) reports that 44% of consumers now choose products and brands based on how well they align to their values. From environmental sustainability to racial equality to political interests, consumers are paying attention to how brands speak and act on key issues

The role of marketing in financial services has expanded into [trust-building](#). For banks, [credit unions](#), insurance agencies, and [wealth management firms](#), this presents a [challenge](#) and an opportunity. In addition to educating consumers and promoting products, financial services marketers now need to tell their companies' own stories about who they are and what they believe in.

This takes more than a press release or a social media post. But with nearly half of consumers reporting a commitment to sharing values with the brands they purchase from, it's time to start investing in [corporate social responsibility storytelling](#).

Launching Your Financial Services Marketing Strategy

Once you have your target audience, your key channels, your goals and KPIs, and your high-quality content ready, it's time to launch your financial services marketing strategy.

To achieve personalized marketing at scale, you'll need a trusted technology partner with a [proven track record](#) of helping financial services brands achieve marketing success. The Act-On marketing platform has the powerful functionality and flexibility your team needs.

Get a Personalized Demo of Act-On Marketing Automation Software

Get a Demo

