Adobe

Made for Adobe Marketo Engage.

How one of the main challenges facing financial services firms can be overcome – and more – with a platform designed to perform.

Financial services organisations need to match – and ideally exceed – customer expectations.

Nowhere is this more apparent than in the vital task of providing seamless experiences.

89% of consumers report switching to a competitor after a poor customer service experience.

Harris Interactive

After one bad experience with a company, **17%** of consumers will walk away. After several bad experiences, **59%** will leave.

PWC

But customers aren't impressed.

They hugely value customer experience – but think that many financial services firms are falling short.

Only **27%** of consumers say they receive a seamless experience across their bank's branch, online, and mobile channels.

Accenture

Meanwhile

80% of investors under 40 indicated they would leave their asset management firm if it failed to provide an integrated channel experience.

Marketo

Customers also value being treated as individuals.

72% rate personalisation as "highly important" while Millennials place the highest value on personalisation (79%), followed by 75% of Gen Z, 74% of Gen X, and 58% of boomers.

Business Wire

But again, they feel that in many instances it's simply not happening.

Only 43% of customers and 34% of high-net-worth customers feel that their bank is sending them relevant and personalised offers.

IDC Analyst Connection

There's good news though.

Financial services organisations are aware of the challenges they face...

They recognise that things need to change.

Research among leading bankers showed the overall majority, 73%, cite improving customer experience as their number one priority, followed by reducing operating costs.

RT Insights

63% of financial services organisations ranked customer experience as their top priority. Financial services companies are shifting their focus toward the customer experience – and that includes inbound phone calls.

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85% of financial services professionals believe that responding to customer expectations faster is an urgent need for the business.

Rivigo

And with Adobe Marketo Engage, they can. That's because Marketo for financial services offers:

Seamless buyer and customer engagement
To keep audiences engaged across online and offline channels

Intelligent lead nurturing
To keep leads informed and engaged, including through automated delivery of personalised experiences

Streamlined campaign creation
To automate lead- and account-based experiences, including real-world, non-linear buyer journeys

Measurable, impactful investments
To see what channels, touchpoints and content performs best

And superior availability too:
Monitored 24x7 and designed for exceptional fault tolerance and resiliency, the Marketo Engage system maintains 99999% or greater availability

And these capabilities have seen:

Charles Schwab grow prospect engagement by 500%

Learn More

Altisource deliver 36x more campaigns in the same time frame

Learn More

United Heritage Credit Union reduce unsubscribes by 71%

Learn More

"What's exciting about Marketo Engage is that you can actually start to see the benefits that marketing is bringing to the table. It's so hard to have attribution for what we're doing and it's great that Marketo Engage provides that kind of analytics."

Mary Rosai Senior Vice President, Institutional Services Marketing Charles Schwab

So, whether you're in banking, insurance or asset management, Adobe Marketo Engage helps you be bullish on one-to-one personalised marketing experiences at scale.

Learn More

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