

# PAVING THE WAY

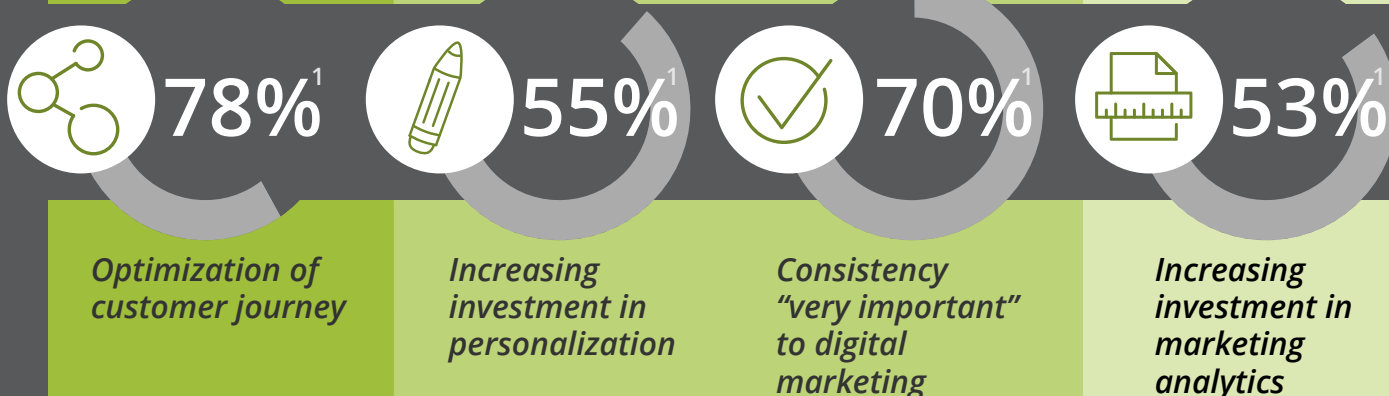
## for Sales Success in the Financial Services Industry



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:



### 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



### 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



### 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

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