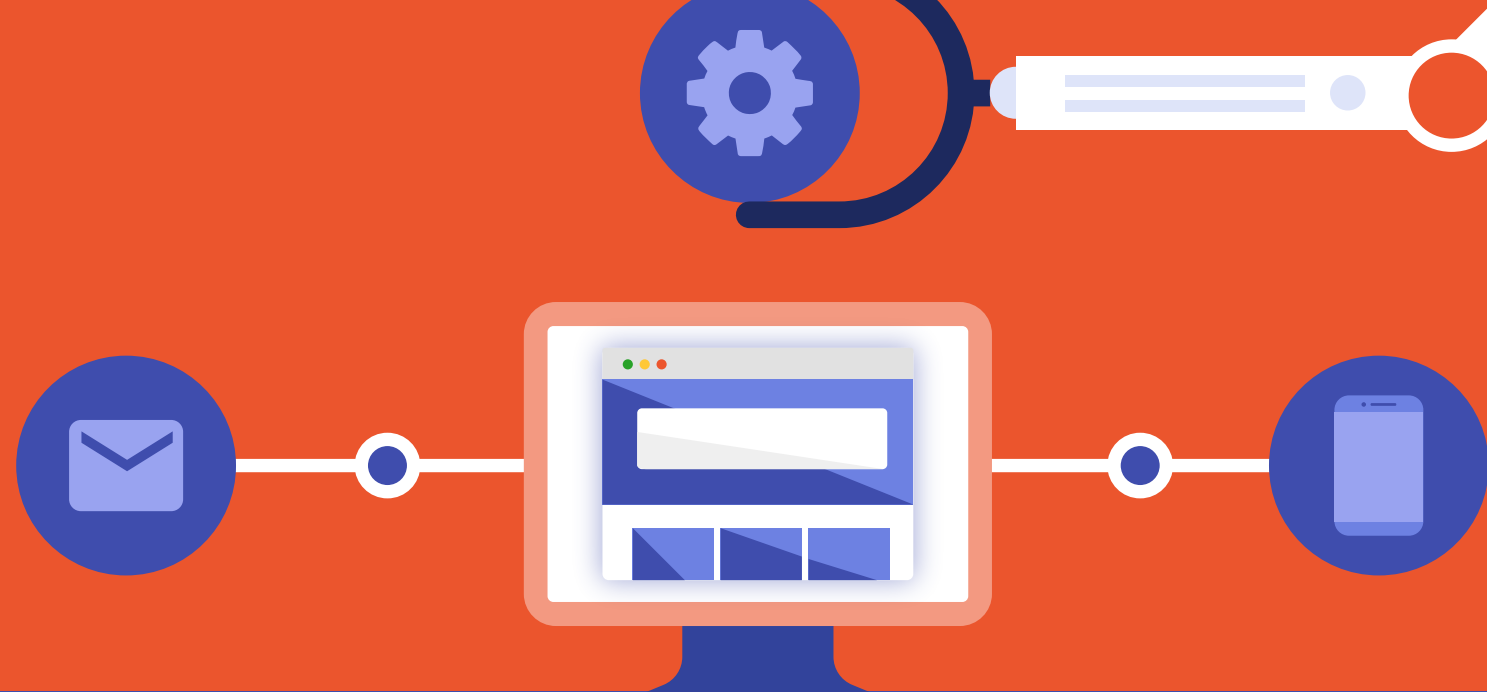


# Why Banks Need MARKETING AUTOMATION

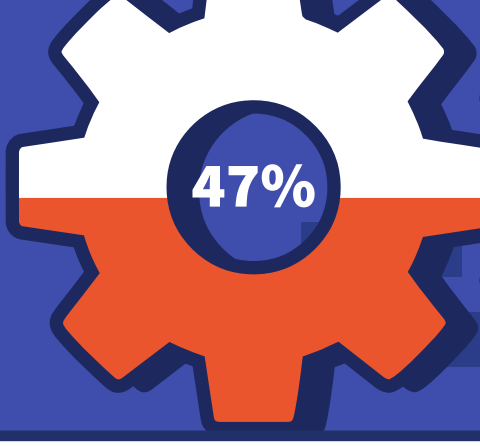


According to TechTarget, marketing automation is defined as a type of software that allows companies to effectively target customers with automated marketing messages across channels, including email, websites, social media, and text messages, to generate sales leads.

In the 2018 Digital Banking Report, only

**47% of banks**

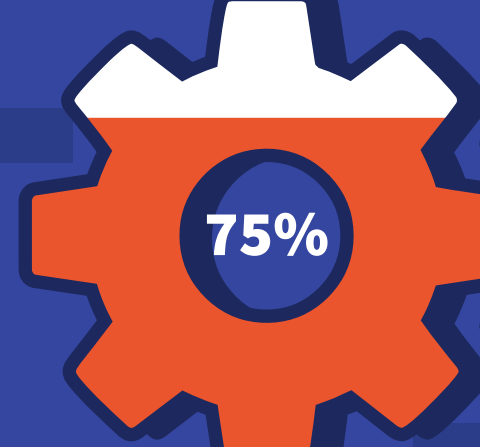
stated they “strongly agree” or “somewhat agree” that they leverage data for marketing automation.



Marketing automation has taken off across all industries in various forms. In Social Media Today’s State of Marketing Automation Survey 2019,

**75% of marketers**

said their business currently uses automation tools.



It’s time for banks to get on board.

Marketing automation tools have the power to...

Streamline campaign development, saving you time and money

Deliver targeted, personalized communications to specific groups at the right time

Execute effectively on a comprehensive marketing strategy



Here’s what a marketing campaign looks like *with* and *without* automation.

## With Automation

1

Create dynamic lists that are updated daily based on targeted criteria or filters

2

Schedule and auto-send marketing emails to targeted lists

4

Support your staff with automated conversation prompts based on triggered lists\*

3

Automate follow-up emails and additional touch points based on prior behavior to stay in touch

\*Example triggers include: birthdays, a 25% balance increase, high attrition risk, or a predictive model indicating the customer’s next best product

## Without Automation

1

Export spreadsheets from your CRM, scrub data, and import into a third-party email vendor

2

Manually schedule and personalize follow-up emails repeatedly throughout the campaign, without consistent timing for touch points

3

Determine a content path for each lead based on guesswork rather than behavior data

4

Review responses manually and design future campaigns without reports or data analysis to inform decisions

The 360 View growth platform includes a marketing automation module that helps you...

- Create lead lists with ease
- Use data analysis to target the right prospect with the right product at the right time
- Personalize and automate marketing touch points based on prospect and customer behavior
- Automate customer onboarding
- Communicate effectively with customers via message prompts
- Generate performance reports to guide future campaigns