

Blazing New Trails



The financial customer journey is always on – connected across every digital channel and device. For banks, insurance companies, and wealth management firms the goal is the same: be the trusted financial partner your customers can count on when and how they need you. Every client relationship forges a unique path to brand loyalty and advocacy. Navigating the ever-evolving landscape of technology, regulations, and customer expectations might feel overwhelming, but with some perspective – and integrated, immersive customer journeys with Salesforce – you'll reach your destination in no time.

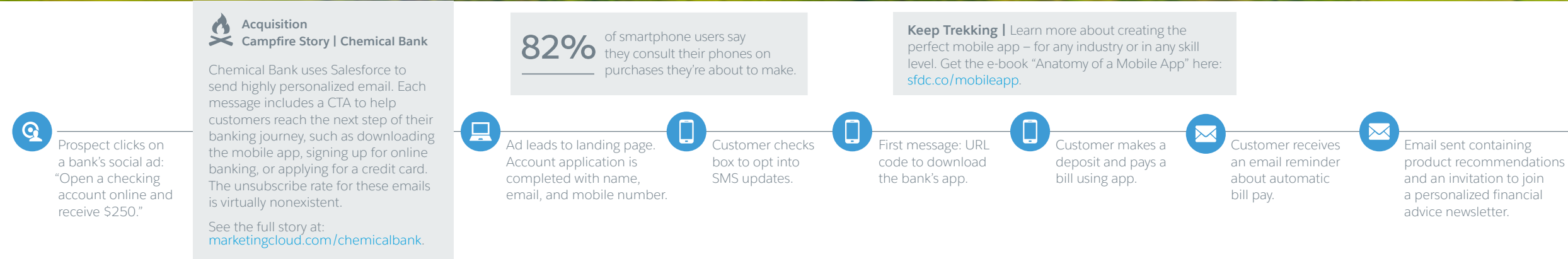
Connect your marketing with sales and service, apps, and communities for a singular, seamless brand experience. Touch your customers' lives when it matters, and foster lasting relationships across every stage of their financial journey.

Read on to explore four sample journeys to success – for the brand and the customer.

Banking

ACQUIRE | Embark with a Growing Audience

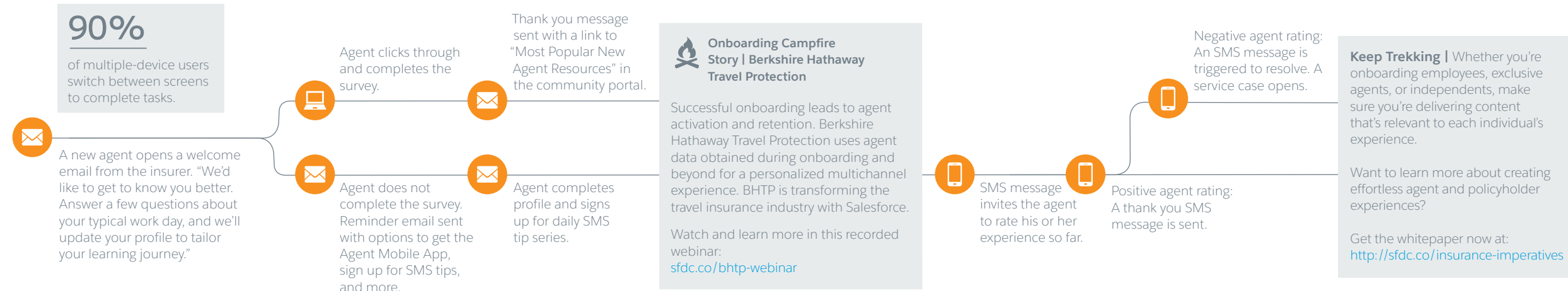
"The first step is the hardest," as the old adage goes – but it doesn't have to be. Getting potential customers to choose your brand over the competition is a matter of a well-plotted course. The first interaction with your brand sets a precedent for the relationship, so relevancy and timeliness are crucial from the outset. Take a look at this path for a view of how a successful customer acquisition journey can begin.



Insurance

ONBOARD | Start off New Agents and Advisors on the Right Foot

Delivering amazing, effortless experiences in the financial industry often comes down to the people on the frontlines interacting with your customers. In the insurance industry, these key relationship managers may be direct employee producers or independent agents. As soon as they're hired or recruited to represent your brand, new agents will be at the height of their excitement to do business. Show them you're also excited about building a relationship: Take a moment to get to know their interests and channel preferences. Are they always in the field on mobile devices or working in front of their computers? Educate new agents with all the insights and resources they need to produce great results wherever they are. Here we have one such onboarding journey.



Wealth Management

ENGAGE | Forge a Steady Path – Together

Every client has unique needs based on where they are in their financial journey. The best advisors deepen relationships with clients by understanding those needs and keeping in regular contact. Unfortunately, clients get busy and often don't respond. World-class firms provide advisors with marketing approved messages and journeys that advisors initiate when they're not able to effectively communicate with clients 1-on-1. Check out this advisor-driven engagement.



Mortgage

RETAIN | Win Back Prospects When They Wander Off the Trail

Just as important as balancing customer engagement is recognizing when members of your audience are at risk of leaving. Just because they aren't engaged with your brand doesn't mean they're not still in the market for your products and services – or won't be in the future. Potential homebuyers or refinancing customers often start the application process, but don't finish when plans change. They may be unable to take action now, but you can keep them engaged with relevant content related to home improvement, interior design, or interest rates in their area. Check out this retention journey for potential refinancing customers.

