

Strengthen Financial Trust through Personalized Marketing

Korcomptenz leverages personalized marketing strategies to build trust and improve customer relationships in the financial sector. Our tailored approach ensures your brand resonates with clients, driving engagement and loyalty.

Navigating Digital-First Expectations: Seamless, Personalized Communication in Finance

With a shift towards digital-first interactions, we expect our banks and credit unions to provide seamless, personalized communication. Be it through mobile phones, social media, or in-branch visits, the experience should be smooth, fast, and easy. We are also more conscious of data security, requiring clarity and proactive disclosure of terms, fees, and policies to establish trust.

In the finance industry, which is heavily regulated, combining personalization with security is essential. Although creating customized digital experiences can be challenging, it presents a valuable opportunity to stand out from the competition.

Essential Components of Modern Financial Customer Engagement



Digital-First Strategy



Customized Content



Seamless Cross-Channel Experience



Proactive Communication of Terms, Fees, and Policies



Exceptional Data Security

Data is the Foundation of a Successful Personalization Strategy

Interesting Insight

- Based on research, **62 percent** of banking customers are ready to provide personal information for improved relevance in communications.
- According to ZDNET, **82 percent** of clients in financial services prefer to control access to their data.

Creating effective, personalized experiences relies on data such as age, location, client type, financial interests, and readiness to open an account or just seek advice.

Key Data Points Financial Firms Use to Personalize Digital Content

- Basic personal details such as age, name, and location
- Transaction record and account specifics
- Patterns of account usage, such as frequent transactions
- Data from digital interactions, including website visits as well as app usage
- User feedback and preferences

By leveraging this data, you can tailor services to fit individual needs and maintain compliance with data protection laws. For example, recognizing a client's interest in buying a home enables you to offer timely and relevant services. This approach not only meets clients' needs but also establishes you as a trusted advisor, fostering loyalty and trust.

Build Trust with Open Data Security Measures

Personalized content is a priority for bank customers as well as credit union members, but they may be cautious about sharing their data. Build trust by openly detailing your data security strategies and compliance with privacy standards.

Five Strategies for Secure User Data Collection

- **Adopt strong data protection practices:** Leverage encryption, secure storage methods, and conduct consistent security audits to secure collected information.
- **Ensure transparency:** Clearly inform users about the data you collect and its purpose, adhering to data protection regulations like GDPR and CCPA.
- **Collect only necessary data:** Focus on acquiring only the data required for personalization to reduce the potential for data breaches.
- **Get clear consent:** Ensure users clearly understand and agree to data collection by obtaining their explicit consent.
- **Keep compliance procedures current:** Regularly review and update your practices to stay aligned with evolving data protection regulations.

Trust Your Data

While third-party cookies have been crucial for monitoring user behavior as well as online targeted ads, they are now being extensively excluded over privacy issues. Marketers should quickly adapt by focusing on making the best use of their data.

Directly capture and examine data from customer interactions, including website visits and app usage. Use your system's analytics to gain insights into customer behavior and inclinations without sharing their information with third parties.

Clearly Communicate Your Privacy Policies

Follow privacy laws like GDPR and privacy in Europe, as well as CCPA and CDPA in the US openly. Build trust by offering users explicit consent and opt-out choices for data control.

If you need to update your data privacy policy, inform users and clearly explain the changes in simple terms. This approach helps your bank and credit union build trust in your services.

Develop Robust Security Protocols

Incorporate strong data governance as well as security inspections into your strategy. Regularly conduct privacy impact measurements to identify and address potential vulnerabilities in data handling.

A clearly defined data retention policy, which outlines how long different data sets are kept and ensures secure methods for deleting outdated information, can also be effective. Such practices build trust with your audience and improve your brand's reputation.

Maintain Compliance with Martech Solutions

Ensuring compliance becomes more complex with a growing marketing tech stack. Simplifying your approach can prevent many issues.

Use a single ISO-certified digital experience platform (DXP) to manage your content across various channels, and keep your technology updated with frequent patches to avoid vulnerabilities. Implement strong authentication, such as SSL certificates, to secure data transmission.

Our Success Stories

Flooring Giant Transforms UX with Kentico Xperience.

Business Transformation Driven by Enhanced Customer Experience and Advanced Website Features for a Leading Flooring Manufacturer.

[Read Our Case Study](#)

Modernizing Legacy Systems with Kentico Xperience

Learn how we transformed a travel media company's technology stack with Kentico Xperience, enhancing performance, analytics, and customer experience.

[Read Our Case Study](#)

Korcomptenz' Role in Driving a Successful Personalization Strategy



Integrated Personalization

Get a DXP with comprehensive CMS and digital marketing capabilities. Its built-in features, including personalization, contact segmentation, analytics, as well as email marketing, allow you to manage and store customer data internally.



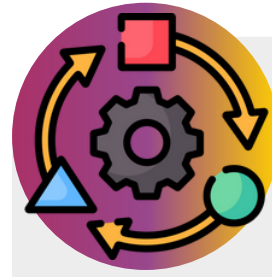
Protected AI Capabilities

Our AI solutions include product recommendations, content generation, copy refinement, and email creation, with a strong emphasis on data security.



Unified messaging across all channels

A centralized content hub keeps all your digital assets and content in one location, easily accessible for use across various channels.



Adaptability and Consolidation

Our DXP solution comes with CMS as well as digital marketing expertise. You deploy it as a standalone solution, integrated with different technologies, or leveraged as a headless CMS.



Protection and regulatory adherence

Manage user roles, ensure GDPR and CCPA compliance, manage cookie levels, adhere to a 7-day bug fixing strategy, implement weekly hotfixes as well as monthly updates, maintain ISO 27001 certification, and receive round-the-clock global support. We're constantly equipped with modern .NET technology.



Rapid ROI

With a diverse array of unique features and more efficient processes, you can achieve greater results with less effort. Comprehensive training and documentation simplify onboarding and minimize resource requirements.

Get in touch for a free consultation and let's work together to achieve your goals.

Contact us today



Korcomptenz

Korcomptenz is a total technology transformation provider that partners with clients to improve their digital experience and insight. We unlock the power of technology in the areas of ERP, CRM, infrastructure management, cloud, data and AI to empower our clients with intelligent and experiential solutions. We **#FocusOnYou**

Discover how we **#FocusOnYou** at www.korcomptenz.com

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