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How to Boost Lead Generation for Your Financial Institution

If you're a marketer for a financial institution, you're looking for ways to increase leads for products and services. No doubt you're doing mailings, eblasts, online banner ads, and in-branch promotions, along with keeping your website updated.

But, are your account holders actively engaging with your marketing content? Are you generating the leads you need to increase adoption, grow revenue, and lower churn?

The truth is most financial institutions (FIs) don't work hard enough in cultivating their current account holders. It costs 5x less to develop your existing account holders than to acquire new ones. And success in generating more leads will come more quickly from your established base that already use financial services from you.

But just sending more direct mail and blasting emails to them will not work – it may turn them away from you. The way to cultivate and grow a relationship is through a hyper-personalized experience.

Use your existing account holder data to deliver a personal web page (PWP) this is an essential first step in providing better service and experience to account holders. Information and content are individualized to each account holder's and match their current financial life stage.

An account holder's auto loan is at the end of the term in three months. So, you provide auto buying educational materials, a pre-qualification, a promotional offer, some calculators, rates and term options, and an online application. The possibility of delivering a more personalized experience is endless when you provide an individualized experience based on life events.



6 Key Concepts to Pump Up Your Lead Generation

1. Realize that you don't have to build it yourself
2. Get executive support to have all teams working together
3. Take an agile approach
4. Prioritize lead generation through an ROI strategy
5. Begin by onboarding new accounts to services
6. Craft stories for users to explore easily



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Realize you don't have to build it yourself

Marketing automation is a critical part of turning the financial institution experience into a lead-generating machine. Building your own isn't easy, takes time, and costs a lot. However, having an outsider's perspective and development can bring new functionality and lower cost to implement while having an already proven case study history.

Get executive support

Success begins from the top down's commitment to a more individualized personal experience by setting the direction for every team to cooperate in making the process work. To gain CEO buy-in for your marketing initiative:

- Identify executive priorities
- Define what your sales organization can handle
- See what others have implemented
- Get input from your sales team
- Show how a solid lead gen plan helps the bottom line

Marketing, sales, technology, and analytics are working together to coordinate efforts that drive a solution for support by the CEO.



Take an agile approach.

It's important to realize that digital transformation isn't just about providing account holders with online banking. There are countless large and small financial institutions that already fell prey to fintech intruders because they scrambled to transform their online experience once COVID-19 hit. Real change comes from adapting to the account holder, changing the business process, and embracing an agile methodology constantly and consistently to stay competitive.

Don't get caught up in project management or have every minute experience detailed. Instead, think of it as a walk, run, ballet... begin with what's needed to make account holder's stickier to your institution by adding more products and services.

Agile is an iterative process of building and testing products rather than waiting until the completed project is delivered. If problems occur or changes need to be made anywhere along the line, they can be addressed sooner. One fundamental tenet of agile methodology focuses on satisfying account holders' needs rather than merely building products and back-end technologies. Improving the account holder experience through every touch point is the No. 1 priority.

As you get up and running, data and leads will help guide further product components and a refreshed leads campaign process.

"McKinsey & Company says that agile methodologies can increase product development speed and decision efficiency by five times."



Prioritize lead generation

What financial institution products and services provide the lowest hanging fruit? These details help narrow down a starting point to create a meaningful ROI with potential leads. Next, ask for precisely what you need to qualify a lead - nothing more and nothing less.

Suppose you create a compelling PWP experience. In that case, members will want to engage with the content that provides value to their financial situation.

The page visit is a quest. Their goal is to access content, tools, and educational materials and receive value from your products and services. The PWP allows your account holders into your brand website. PWPs are delivering content without account holders having to go through multiple menus and clicks to reach their goal on your brand website.

Begin by onboarding new account holders to services

Integral to an effective onboarding strategy is a good account holder acquisition process. From the first few minutes of an account opening through the entire first year, financial institutions are faced with make-it-or-break-it windows of opportunity.

New account holders are most likely to purchase additional products and services during this period. They're also the most likely to leave. Industry research by J.D. Powers & Associates has shown that 75 percent of cross-sales occur within the first 90 days.

You don't get a second chance to make an excellent first impression. That's why relevant communication must begin in the first moment of opening an account. The PWP provides value-added messaging delivered in a dynamic way that individualizes its content.

Account holders today demand and expect their financial institution to know them well enough to be able to anticipate their needs. Through data and predictive modeling, a PWP can add or subtract components based on each account holder's situation.

Craft stories for users to explore

PWPs are almost magical; each account holder's journey is also a story in the making, curating helpful content for your account holder in real time.

Through your AI-enhanced data, each component helps generate leads and make sure account holders are correctly targeted. The challenge and opportunity are to deliver what they want – from content and information to experiences. It's about constantly refining the knowledge from data insights to provide valuable content to them and answer their questions. PWPs help account holders make more informed financial decisions as well.





OneClick Financial Connects the Dots – So You Don't Have Too.

The OneClick Financial platform and PWP's deliver a relevant, transformational digital experience, including Welcome/ Onboarding, Thank You for Adopting a New Product/Service, Cross-Selling, Retargeting, and Ad Hoc campaigns.

OneClick's unique features are designed to engage personal and business account holders in a one-to-one, data-driven, customized experience while generating leads and driving account holders to your website for additional actionable engagement.

Contact us today to schedule a demo or learn how OneClick Financial can help you build a data-driven, hyper-personalized digital relationship with your account holders that increases your financial institutions share of wallet.



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