



Digital marketing transformation: top tips for **Financial Services**

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Introduction

Digital transformation is a challenge and an opportunity for financial services marketers. **According to Forrester, while 26% of FS firms recognize that it is never ending, 14% mistakenly think they've already 'done' it.** To surpass your competition, you need to make [an online impact that puts you firmly on the digital radar](#). Here are four top tips to fuel your digital marketing strategy in 2021.

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Prepare your team for digital disruption



Deloitte reports that **90%** of respondents agreed or strongly agreed that digital technologies are disrupting the financial services to a great or moderate extent.

But, **only 38%** of respondents believe their organization offers the necessary development opportunities needed to thrive in a digital environment.



To become a digital-first organization, your workforce must also be digital-first. Opt for intuitive solutions and provide training to instill confidence in more hesitant team members. In 2021, your business and your team members [will need to be agile](#).

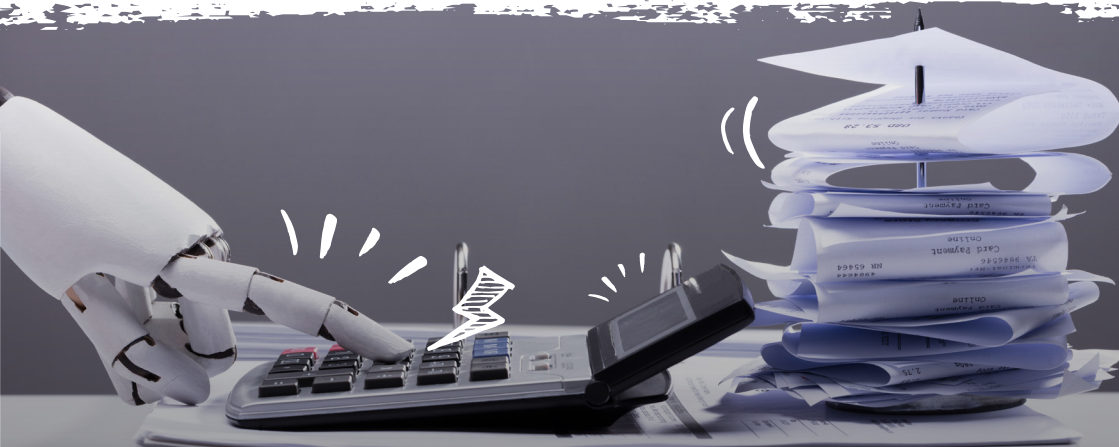


Embrace automation



“ Forrester discovered that 68% of financial services firms are investing heavily in SaaS, and 43% in business intelligence and analytics.”

When it comes to building a technology stack, opt for high-end solutions that help you achieve your specific digital goals. So, automation will provide your business with significant value — streamlining processes; improving CX; eliminating error and removing the need for repetitive tasks; in turn boosting engagement and even delivering engaged opportunities, leads and insight directly to your team.



Make data-driven decisions



Only 40% of organizations aim to increase data-driven marketing budgets, according to Invespro.



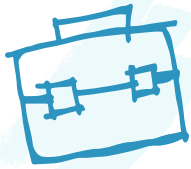
And, what's worse, those that aren't are missing out on 5-8x higher ROI from their campaign spend.



Your customer and prospect data, the data captured through your marketing channels and data you're missing out on and don't even see — it all tells a story. Analyzing this valuable insight, identifying the various groups that make up your wider audience, and **designing campaigns specifically for each of these segments**, prospects and customers will help you provide unbeatable CX, convert more customers, close more business, grow sales pipeline and achieve greater marketing ROI.



The need-to-know tactics for Financial Services marketers for the new decade



“ According to WordStream, financial services keywords are some of the most expensive when it comes to Google Ads. ”

However, **WebFX reports that their average conversion-rate is as high as 6%**. Marketers must invest in effective digital strategies — and search ads are just one of many. Marketers must invest in digital strategies to reap the rewards — and search ads are just one of many tactics. In today’s world, prospects and customers are surrounded by video, are seeking immediacy, and have infinite content and research at their fingertips. If your digital marketing strategy isn’t evolving with the times, you risk falling further behind.



Web Insights cuts out the noise to deliver insight to B2B organizations, precisely where and when it's required. Our high-end software solution is a world class business growth enabler, assisting brands to become more efficient and effective, capitalizing on every website opportunity in real-time. The technology instantly recognizes website visitors and automatically routes them to the relevant person within your business — the ultimate solution for marketers looking to optimize lead generation, embrace automation, and do so without disrupting busy, high-performing enterprise teams.

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