

# Marketo Engage for Financial Services

**FACT:** If you're not adapting to customer expectations, you're putting your company at risk

Wealth is shifting to a generation of customers born and raised in the digital age—who expect timely and personalized business communications. As the digital-native population grows, FinServ companies that adapt to meet these new expectations will reap the benefits far into the future. Those that don't will be left behind.

**64%**

of customers say customer experience is more important than price in buying decisions.

Source: Gartner

Only **27%**

of consumers say they receive a seamless experience across their bank's branch, online, and mobile channels.

Source: Accenture

**28%**

of banking providers rate digitally native companies as their biggest concern.

Source: Econsultancy

## How Marketo Engage can help

Ready to master the art and science of digital marketing? Marketo Engage combines simple functionality with powerful capabilities to help you build loyal, long-term relationships with clients and advisors:

- **Keep pace:** Generate proactive communications based on known needs and preferences.
- **Personalize at scale:** Deliver 1:1 customer experiences that are timely, relevant, and secure.
- **Prove marketing impact:** Accurately measure marketing performance on demand.
- **Speed time-to-value:** Accelerate results with seamless integrations and unrivaled support.



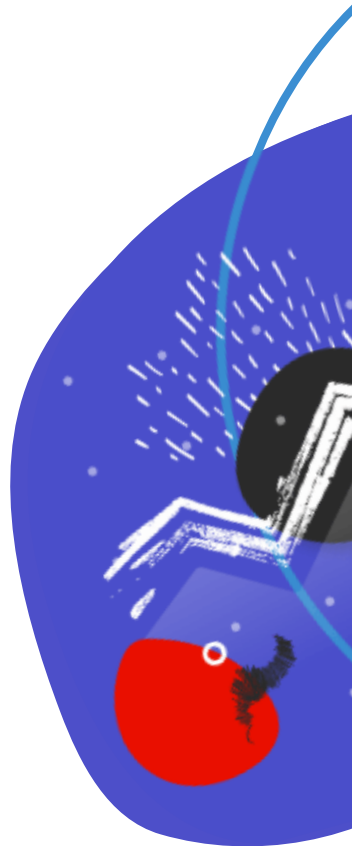
**Continuous  
Innovation**



**Complete  
Ecosystem**



**Asset Management  
Expertise**

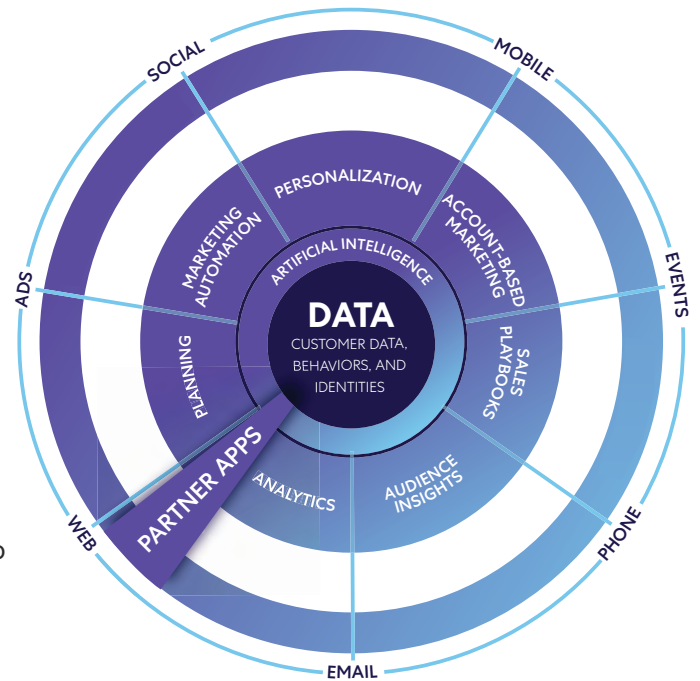


# One platform, every engagement, any channel

Deliver the authentic experiences your customers desire! From acquisition to advocacy, Marketo Engage has solutions to meet your every marketing need. Choose from complete pre-packaged bundles or customize a solution that's just right for you.

## Built on a cloud foundation you can trust

- **World-class security:** Built on a modern, big data, SaaS architecture, Marketo Engage has passed the audits of some of the largest financial services organizations in the world. Marketo Engage tests all code for security vulnerabilities before release, regularly scans its network and systems for vulnerabilities, and conducts third party security assessments.
- **Superior availability:** Monitored 24x7 and designed for exceptional fault tolerance and resiliency, the Marketo Engage system maintains 99.995% or greater availability. See the system uptime data here.
- **Powerful configurability:** Flexible data model includes custom fields, custom objects supporting complex relationships, and custom activities from across different channel and device touchpoints. It also supports large-scale IoT applications for forward-looking marketing strategies.



What's exciting about Marketo Engage is that you can actually start to see the benefits that marketing is bringing to the table. It's so hard to have attribution for what we're doing and it's great that Marketo Engage provides that kind of analytics."



**Mary Rosai**

Senior Vice President,  
Institutional Services Marketing  
Charles Schwab

**See how other companies have strengthened their relationships  
with Marketo Engage by contacting [sales@adobe.com](mailto:sales@adobe.com).**



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