Adobe

Personalizing personal banking

Financial services companies are banking on a new tech ecosystem to make services more accessible and connected.

Personalization is important.

72% of financial services consumers rate personalization as "very important" in their banking decisions.

It's important—but it's not easy.

33%

One-third of finance executives are "very concerned" about privacy-centric regulations and their CX data.

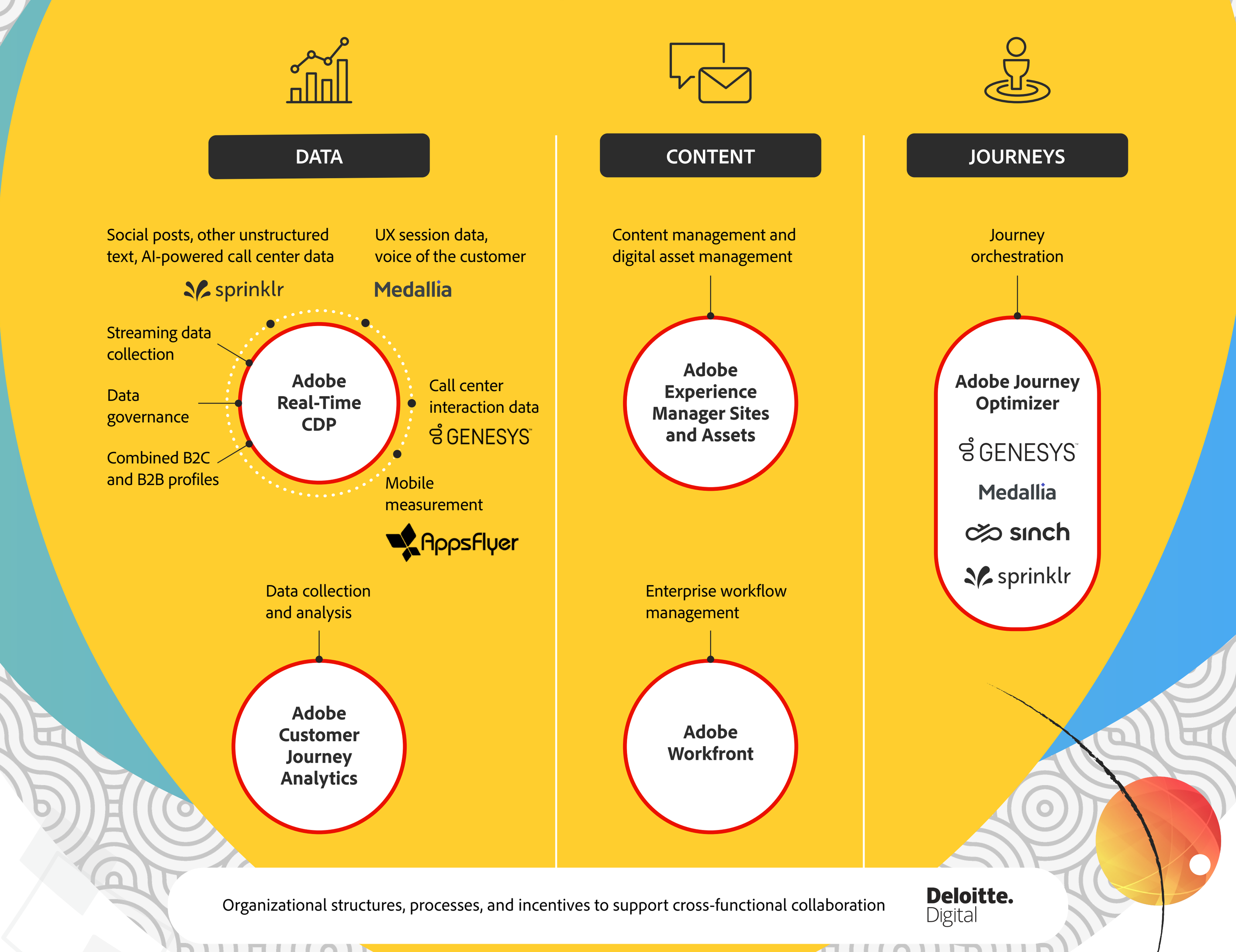
More than 25% of financial services organizations have their marketing data divided among multiple systems.

Financial services firms face many obstacles to personalizing their customer experience:

- Regulatory compliance
- Data privacy
- Outdated tools and processes
- Fragmented customer data
- Lack of context across customer communications
- High customer expectations

Overcome your personalization challenges with the right tech stack.

Adobe and its partners provide integrated solutions for extending personalized experiences through the entire customer journey.



Better together.

How Adobe and partners are helping financial services companies achieve their personalization goals.

AppsFlyer

Stash—acquiring new customers and gaining insights into their journey with AppsFlyer + Adobe Experience Cloud

"AppsFlyer is an invaluable solution that brings light to our user journey, and gives us more confidence in our web-to-mobile strategy."

– Kate Palmer
Former Director of Growth
Stash

Deloitte. Digital

$5 million saved by eliminating inefficiencies

Large global bank—getting the right content to the right people with Deloitte + Adobe Experience Manager, Analytics, and Target

Deloitte helped a global bank implement Adobe Experience Manager Sites, Adobe Analytics, and Adobe Target to distribute hyper-relevant content in real time—and **save $5 million** by eliminating inefficiencies.

GENESYS

Nationwide—empowering call center reps to deliver personalized service with Genesys + Adobe Experience Platform and Experience Cloud

"Our end customers want to have a good selection of coverage and policies at the lowest price possible. And during interactions, customers expect **quality experiences** that are effortless, personal, and reassuring."

– Sri Sankar
VP of Customer Experience Strategy and Engagement,
Nationwide

Medallia

45%

Fidelity International—transforming the customer journey with Medallia + Adobe Analytics

Fidelity International, a top global investment management company, deployed Medallia and Adobe Analytics to map the customer journey and identify opportunities to improve—and **increased its net promoter score by 45%**.

sinch

87%

Large Belgian bank—using personalized AI-powered chatbots to boost conversions

One of the largest banks in Belgium **increased conversions by 87.5%** by implementing a personalized AI-powered chatbot from Sinch that allows customers to fill out forms quickly and easily. Sinch products work seamlessly with Adobe Journey Optimizer and Adobe Campaign Classic.

sprinklr

200+ financial institutions are supported by Sprinklr's purpose-built AI engine.

Financial services companies—adopting AI by the hundreds with Sprinklr + Adobe

Adobe and Sprinklr empower financial services and insurance companies to provide personalized customer care through 30+ social and digital channels. So far, **200+ financial institutions** are supported by Sprinklr's purpose-built AI engine.

Learn more about personalizing the CX in financial services.

Read the full report by Adobe and our partners.

Download report

Adobe

Sources

2022 Digital Trends—Financial Services in Focus, Adobe, March 2022.

2022 U.S. Retail Banking Satisfaction Study, J.D. Power, April 7, 2022.

Lane Martin et al., Insights for Investments to Modernize Digital Banking, Capco, May 26, 2021.

The Mobile-First Enterprise Report: Finance and Insurance, AppsFlyer and Adobe, February 2022.