

Calm Navigation in Agitated Waters

The financial markets are roiling

Financial services and insurance companies today are navigating novel challenges:

- Stock market volatility can create panic selling (see Figure 1).
- Rising inflation, interest & mortgage rates leave customers concerned about how to protect their portfolios (see Figures 2 and 3).

Financial industry experts are coming to the fore to combat these challenges. But changing financial regulations, issues of data governance and fraud mitigation, and disruptive policy and technological changes, keep financial companies on their toes. Given the volatility of the financial markets, it is essential for financial service providers to adapt and evolve their business and marketing strategies. How can they do this? The answer is ...

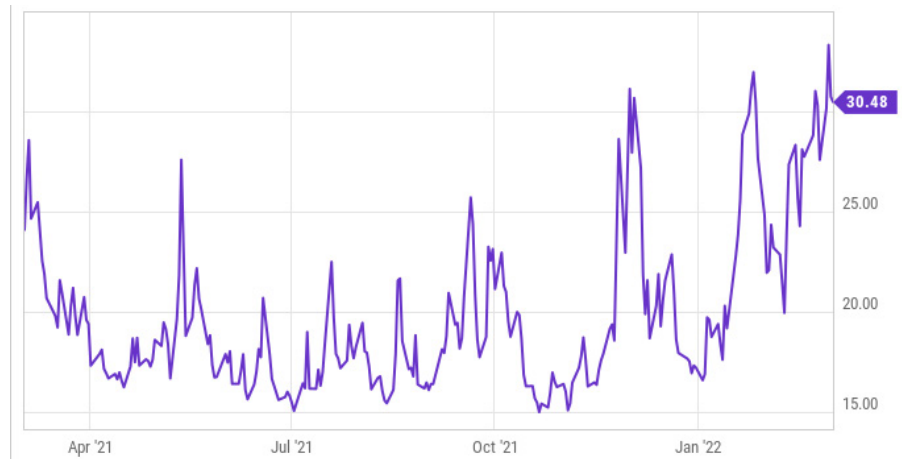
Personalization – and partners – to the rescue

A multi-channel approach driven by digital transformation enables financial services firms to streamline their marketing initiatives and reach their audiences more effectively. Are your customers ...

Are your customers ...

- not making rash financial changes, but instead seeing the long-term view?
- investing in the right financial products for this time and these conditions?

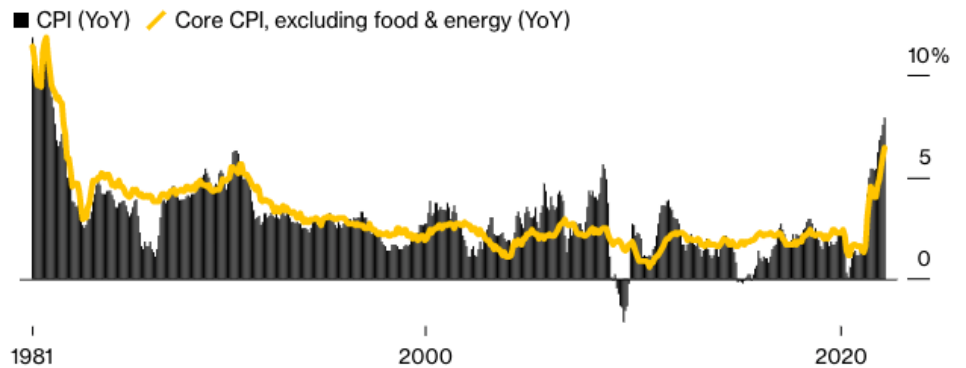
Figure 1: CBOE S&P 500 Volatility Index Level



Source: VIX data by YCharts

If the answer is “no”, what can you do? One answer is to engage your partners (brokers, agents, advisors) to expand your reach and customize marketing efforts for targeted audiences. These channel partners play a significant role in supporting your message and driving customer engagement. When you equip your brokers, agents, and advisors with powerful customization tools, marketing communications are a lot more relevant and personalized. This personalization elevates customer experience – and takes ROI to the next level.

Figure 2: U.S. inflation accelerated to a 40-year high of 7.9% in February



Source: Bureau of Labor Statistics

Empower your financial channel partners with personalized marketing

Your agents and brokers are the key interface between your customers and your brand. It is imperative that your financial services firms leverage your networks' local reach. Personalization has the potential to drive up to **15% revenue growth** in the sector, and so savvy financial services firms like yours are now catapulting their marketing initiatives and content through their partners' customization lens.

Personalized marketing will be the key trend dominating the financial services sector in the coming years. Companies that focus on growth are already adopting marketing automation tools to deliver personalized offers and content to their customers. And there is more good news.

Enter Distributed Marketing Automation

Distributed Marketing Automation enables your agents and advisors to localize and co-brand marketing assets, making personalization simple – and real. This personalization allows financial firms to align their corporate marketing strategy with local marketing initiatives and campaigns, while also ensuring brand, legal, and regulatory compliance.

With the financial services industry moving towards a more technology-powered and omnichannel presence, now is the time for brands to empower their partners with the right customization tools. An effective Distributed Marketing Automation solution helps agents, brokers, and advisors run localized campaigns and offers designed to fit their customers' specific needs.

Customization boosts marketing generated revenue, and it also provides the opportunity for a strong brand presence and voice. Both outcomes build customer loyalty and trust.

Distributed Marketing Automation can be a game-changer for financial firms in improving customer and partner experience through:

- **Delivery of relevant and customized offers and content**

Your brokers and agents must be updated with the products, offers, and marketing assets that will best serve their local audiences. Distributed Marketing Automation enables brokers and other partners to access a wide array of pre-approved, branded, and legally compliant marketing assets. Partners can choose from and localize their

communications with up-to-date and templated content that delivers the best offers to individual customers based on their particular needs and situations.

- **Multi-channel support**

Distributed Marketing Automation offers end-to-end support for personalizing marketing collateral that can be used across marketing channels, be they digital or print.

- **Customization control for brand compliance**

Not all of your brokers and advisors are well-versed with impactful marketing tools and strategies – which is why Distributed Marketing Automation is a gold mine for financial services companies. With controlled customization, you can pre-approve marketing assets and templates to ensure impeccable brand and legal compliance.

- **Give your partners a seamless experience**

Distributed Marketing Automation can be leveraged as an independent marketing portal, or integrated with other partner enablement apps to offer a seamless user experience.

We can help fuel your marketing reach and relevance

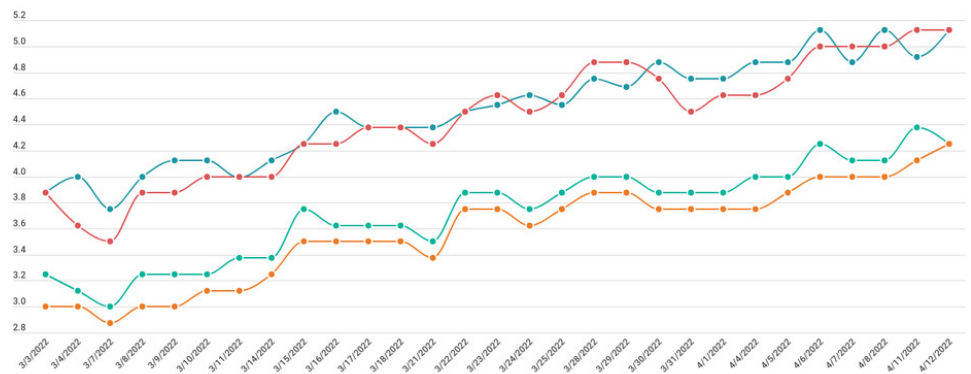
Fielo Marketing is a leading Distributed Marketing Automation solution that offers a centralized repository of pre-approved marketing assets for your broker/advisor partners to localize communications to customers. Your partners can:

- localize their marketing communication through controlled customization,
- ensuring brand and legal compliance in all forms of outreach.
- co-brand and localize communications by customizing standardized templates with images, messaging, brand logo, and other descriptors
- create and execute automated email campaigns and drip campaigns through templated emails

These components of a powerful Distributed Marketing Automation solution will empower your partners with powerful customization, while expanding your marketing reach.

To learn more about how financial services companies are using Fielo and the power of their partners' voices, email us at marketing@fielo.com to ask to talk to a Fielo financial services expert.

Figure 3: 30-day Mortgage Rate Trends



Source: Fox Business – based on data compiled by Credible

