THE ULTIMATE FINANCIAL SERVICES DATA PLAYBOOK

How Predictive Data Helps You Know Your Customers Like You Know Your Friends

Know Your Customers
Like You Know Your Friends

Truly understanding your customers is vital for financial institutions looking to stay competitive in a sea of digital-first competitors and ensure they're providing the seamless experiences your customers and prospects demand today.

Getting to know your customers like you know your friends with predictive data allows financial services brands to tailor products services to their specific needs, offer personalized financial solutions, improve CX, and more.
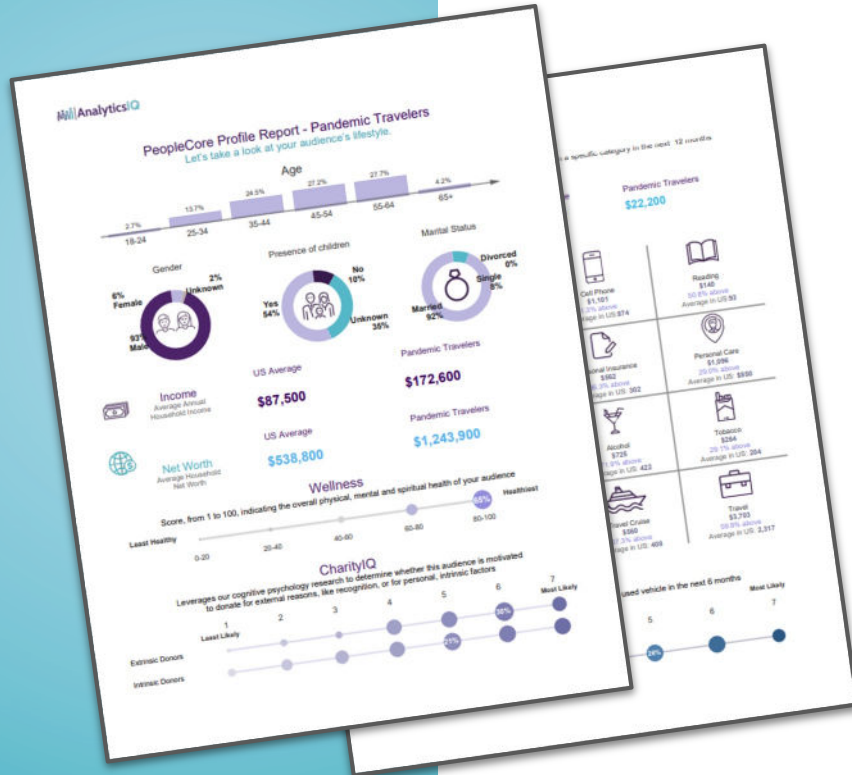
In this playbook, we explore different ways you can get to know your customers and more importantly – how data like AnalyticsIQ can give your entire organization a competitive edge.

Ready to learn more? Let's go!

AnalyticsIQ

Fine Tune Lead Gen with Fresh Insights.

Marketers and advertisers in the finance industry know that lead generation and offline conversions are key. Unfortunately, however, over 50% of financial organizations lack a measurement solution to understand full attribution. So what can you do if you're one of those companies?

A quick win for your team would be to analyze your converters vs non-converters. For example, at the conclusion of a direct mail campaign, you could append AnalyticsIQ data attributes - or even let us deliver you a profile report - so you can compare the segments.

➔ Do converters possess certain demographics?
➔ Do non-converters display different motivations?
➔ Do converters have a different financial status?

With these insights in-hand, you can fine tune future messaging, targeting, and even build stronger predictive models.

Matchmake Your Prospects, Product, and Touchpoints.

We've all heard the famous marketing phrase, "Right person, right place, right time." Nailing this concept is completely possible with the right data. So how do you do it?

1. Enrich your CRM file by appending AnalyticsIQ data points.
2. Conduct analysis to see which audiences, like "financial growth motivated", are best aligned to your various products.
3. Consider building a model to identify top prospects and/or segment your current customer for a cross-sell opportunity.
4. Leverage unique data points like "financial growth motivated" to tailor your message and call to action.
5. Take your media strategy to the next level by leveraging data points such as "Channel Preference" to ensure you're reaching your audience across the right channels.

AnalyticsIQ

Expand Your Product Portfolio Intelligently.

The financial services industry is facing rapid change, so truly "Knowing Your Customers" and their unique lives is a must.

AnalyticsIQ's proprietary predictive data is unique and relevant. Other data providers have outdated audience segments that tell you if someone is interested in the YellowPages. At AnalyticsIQ, we're living in the present day. For example, we can predict an individual's likelihood to utilize _buy-now, pay-later (BNPL)_ options as they shop online.

With these types of fresh, timely, modern data points, you can analyze your audience to unlock insights that spark product decisions and innovation for your organization. For instance, AnalyticsIQ's unique data points that can lead to product insights include:

- → **Lifestyle**
- → **Motivations**
- → **Behaviors**

AnalyticsIQ

Offer People Products They Need for Their Professional Life.

Nearly 1 in 10 individuals is actually a business owner – whether that's a small side-hustle or a multinational organization, there's a high likelihood that your customer base includes business owners just like this. And just as individuals need financial services and products in their life, business owners do too.

What if you could learn more about your current customers? Did you know that Susan not only has her personal bank account with your institution, but she's also the owner of "Susan's Sunshine Childcare." Unfortunately, she does not have her small business account with your bank. What a missed opportunity!

By leveraging the combined power of AnalyticsIQ's PeopleCore and BusinessCore databases, our Connection+ B2B2C linkage solution can unlock these insights, allowing you to launch effective cross-sell and up-sell campaigns to drive revenue and strengthen your customer ties.
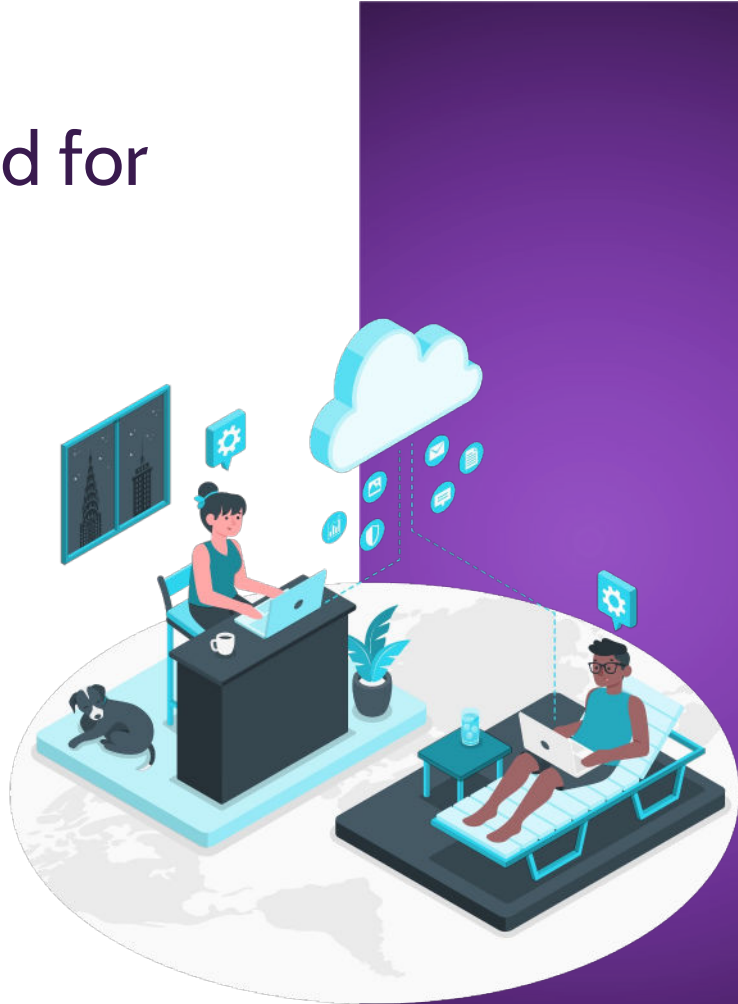
AnalyticsIQ

We Speak Geek.™

At AnalyticsIQ, both marketers and data scientists across industries love and rely on our data. Our offline data and digital audience taxonomies make it easy for marketers to quickly identity and target the most relevant audience segments. For data teams that are digging in, we deliver attributes at a granular, yet easily segment-able level, providing them the ultimate power to splice, dice and model audiences on their terms. What are a few other ways that our approach to data stands out?
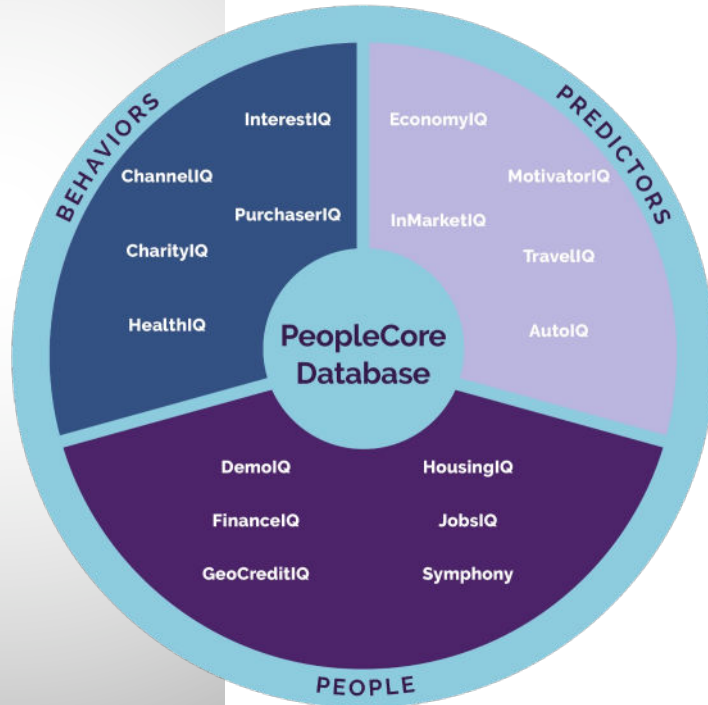
→ **Cross Channel Linkage & Activation**
→ **Personal & Business Data Connectivity**
→ **Data Tailored for Financial Services Advertising**
→ **Custom Audience Development**

Are you ready to start using sophisticated data to grow your business? Our flexible approach makes it easy. Contact us today at **sales@analyticsiq.com**.

FinanceIQ

Financial Motivations
Understand consumers based on their financial motivations and goals

Financial Essentials
Understand consumers based on their day to day money habits

Investment Behaviors
Understand consumers and how they choose to make their money work for them

Data Tailored for Financial Services Advertising
Connect with consumers through fair and unbiased marketing

Know Your Customers & Prospects Like You Know Your Friends.

Putting consumers - and their data - at the center of any touchpoint along the customer journey is key to winning and keeping their business. For that reason, AnalyticsIQ is on a mission to create the most incredible, predictive and relevant data available to brands. That's why clients don't just consider us a data company, but a data innovator.

We are the only company to consistently blend cognitive psychology with data science to understand who people are, what they do and also *why* they take those actions. Our proprietary consumer database, PeopleCore, covers over 255 million individual and 125 million households to create the most accurate and comprehensive view of your audience.

See The Whole Picture with B2B2C Data.

Business
Business Name • Address • Employees
• Annual Revenue • SIC Code

AnalyticsIQ
Connection+
Name • Address • Email
• MAIDs • IP Address

Professional
Name • Title • Role
• Contact Preference
• Messaging Preference
• Purchase Drivers

Individual
Name • Home Address
• Demographics
• Finances • Behaviors
• Motivations

Many other data providers focus only on either B2C or B2B data. But at AnalyticsIQ, we have both assets. AnalyticsIQ combines the power of company data with individual employee intelligence into one incredible database, BusinessCore. Today, brands utilize this data for predictive modeling, personalized cross-channel marketing, product insights, and so much more.

Even more incredible? AnalyticsIQ has the power to connect BusinessCore to PeopleCore with Connection+. Connection+ B2B2C linkage capability is especially powerful for financial services brands looking to identify businesses and find cross-sell and marketing opportunities with a holistic view that includes an individual's personal and professional lifestyle.

AnalyticsIQ