



# Data-led Fintech & Financial Services Marketing Checklist



**ACCURACAST**

# Are You Ready?

The fintech and finance industry, which includes insuretech and the insurance sector, faces significant data challenges due to changes in data collection processes by platforms like Apple and Google.

Moreover, GDPR and CCPA regulations mandate data privacy and security, making them vital considerations in all processes. To overcome these challenges, we offer a data-led marketing checklist with ten key considerations for fintech and finance companies that collect and analyse customer data. This checklist provides valuable tips for business processes and marketing, empowering leaders to make informed decisions, provide better customer experiences, and grow their businesses.

This checklist is a crucial resource for all marketing leaders in the fintech and finance industry, allowing identification of potential marketing obstacles when targeting customers and audiences.

**“AccuraCast is an amazing agency. They helped us achieve excellent results mainly handling Google Ads, Facebook, Instagram, and SEO with link building and Public Relations in Swiss French, German and Italian.”**

TAMARA OBIELUM,  
CCV





## Before we start, a bit about AccuraCast ...

In the fast-paced world of financial services accelerated by fintech and insuretech, standing out from the competition is crucial to success.

Our data-driven marketing strategies, including search, display, and social media marketing, can provide measurable results to help you optimize campaigns and drive growth.

We prioritize creativity, innovation, and data intelligence to stay ahead of the game and help you succeed. Our tailored services are designed to meet the unique needs of your business, enabling you to achieve your objectives and thrive in a competitive market.

# Finance Brands We've Helped Grow





# Your 10-point Checklist

# 1. IS PRIVACY PROTECTED WHEN COLLECTING CUSTOMER DATA?

In the ever-evolving financial sector, establishing trust with customers is more important than ever. With data security concerns on the rise, transparency and trust are now essential for building long-lasting relationships with your clientele. As a brand, it's crucial to be upfront about how customer data is used and to ensure that online services are safeguarding their privacy.

Our recent survey found that 88% of customers have concerns about cookies and privacy, highlighting the importance of addressing these concerns to protect customer data privacy and gathering their data.

## Solution:

- Regularly review and audit your data protection measures to ensure they remain up-to-date and effective.
- Display trust signals such as accreditations and reviews.
- Provide customers easy access to your privacy policy and terms of service to ensure transparency.





## 2. WILL YOU BE ABLE TO ACCESS ALL THE VITAL DATA YOU NEED?

With Universal Analytics being phased out by July 2023, finance businesses must secure historical website visitor data to avoid losing valuable customer behavior info. Failure to do so may result in guesswork when determining consumer behavior, which is a risky move in the fast-paced financial industry.

Neglecting this can lead to a loss of access to vital audiences, significantly impacting the marketing strategy. It's essential to act now to secure all critical historical site visitor data, and move to GA4 or a new analytics tool to build up history in the new tool to enable temporal analysis.

### Solution:

- Migrate to Google Analytics 4 or alternative analytics tool.
- Create new online audience segments for your data needs.
- Back up/export your Universal Analytics historical data to maintain access to valuable data.

### 3. HAVE YOU IMPLEMENTED SERVER-SIDE TRACKING?

With recent changes imposed by providers like Apple and Google, companies in the insurance, insurtech, fintech and finance sector need to identify and grow their target audience lists while complying with new tracking restrictions.

One solution to overcome this challenge is to implement server-side tracking, which enables your server to communicate directly with the ad platform to share events such as quote requests or deposits made.

By using server-side tracking, you can continue to collect valuable data on customer behaviour and make informed decisions for your marketing strategy.

#### Solution:

- Use server-side tracking for GA4, Google Ads, and Facebook Ads.
- Ensure compliance with overseas data sharing regulations.
- Streamline tracking by verifying your domain on Meta Business Manager and declaring necessary events.







## 4. HOW ARE YOU CLEANING UP, UNIFYING & PROCESSING DATA?

It's important to optimize your data at every stage of the customer journey to maximize their lifetime value. This requires unifying data from multiple sources, such as website and app usage, policy information, and customer interactions in branch and across various platforms.

Advanced analytics tools can provide insights into customer behaviour and preferences, allowing you to tailor your financial products and service offering to meet their needs effectively.

### Solution:

- Identify key touch points and potential data gaps.
- Invest in omni-channel tracking and data unification.
- Leverage data insights to tailor the customer experience.

## 5. HAVE YOU GOT A PLAN TO SUPPLEMENT AUDIENCE LOSS?

Even though insurance and finance data is very personal, it's important to recognize that your online audience is not yours alone - social media platforms own the user relationship. As regulations on data privacy continue to evolve, it's getting harder to reach and connect with potential customers through these channels.

By leveraging sophisticated data intelligence techniques, insurers & financial service providers can unlock new audiences and refine their marketing strategies, even when follower counts are unpredictable. With the right tools and tactics, you can take control of your online presence and engage your audience like never before.

### Solution:

- Smaller social media and remarketing audiences can be expected (don't be alarmed!)
- Focus on getting to know your customers better.
- Engage with customers earlier in their buying journey.





## 6. ARE YOU COLLECTING MORE FIRST-PARTY DATA?

Recent changes such as the launch of iOS 14.5 and the impending blocking of third-party cookies on Chrome will impact how financial service providers can target customers and track essential marketing data. To stay ahead of competitors, fintech & insuretech companies should develop new strategies to collect more data from site visitors and customers.

This may include gathering more first-party data directly from your site visitors and prospects. By doing so, you can maintain personalized content and continue marketing effectively.

### Solution:

- Optimize your marketing efforts earn customer data earlier in their journey.
- Engage customers and gather valuable data with innovative methods like gamification and interactive content.

## 7. ARE YOUR REMARKETING CAMPAIGNS OPTIMISED?

Optimise your remarketing campaigns in line with GDPR regulations to maximise their potential. Utilise analytics and cookies to obtain valuable customer insights and preserve audiences made up of your most loyal customers. In the finance & insurance industry, keeping visitors engaged and establishing customer loyalty is vital to long-term success.

Ensure your remarketing strategy captivates your audience, whether you're promoting advisory services, an alternative investment platform or a wide range of financial services.

### Solution:

- Target and engage underperforming customer groups.
- Schedule re-engagement campaigns during periods of low customer activity to avoid attrition.
- Allocate marketing funds towards effective remarketing across multiple channels.





## 8. ARE YOU USING CRM DATA FOR PERFORMANCE MARKETING?

To boost your performance marketing efforts, don't overlook the potential of your CRM data. Remember, in the finance sector valuable customer interactions don't just happen on your website.

Your CRM can reveal key insights into customer behaviour, such as loan applications, new investments, and portfolio changes.

By using this information to optimize your marketing campaigns, you can drive engagement, build loyalty, and achieve better ROI.

### Solution:

- Serve dynamic ads across platforms using CRM data to target specific audiences.
- Utilise chatbots to engage customers and gather data for informed marketing campaigns.
- Craft personalized campaigns for specific conversion actions by analyzing CRM data and predicting customer interests.

## 9. DO YOU DRIVE PERFORMANCE WITH MARKETING APIS?

Precision and control are critical for successful finance marketing campaigns. Marketing APIs provide both, allowing you to take advantage of advanced automation and combining online and offline data. With dynamic creative, real-time optimisation, and data-based audiences, you can effectively engage with your most valuable customers and expand your reach.

CRM data can be used to specifically target higher lifetime value audiences, and you can optimise campaigns to identify similar higher-value prospects. Utilising marketing APIs can help you drive success for your business and stay ahead of the competition.

### Solution:

- Establish metrics to measure customer lifetime value – how this can be calculated varies significantly in the finance sector.
- Personalised content updates can then be shared with specific customer segments to drive higher engagement.





## 10. IS YOUR TEAM UP-TO-DATE WITH THE LATEST TRENDS AND DEVELOPMENTS FOR 2024?

Investing in your marketing team's skills is not just a good idea - it's essential for survival. The right training on GA4, and advanced marketing techniques with data, could be a game-changer for your business.

In addition to the regulatory restrictions your marketing team must navigate, they also need to know how to effectively use the data you collect, while maintaining customer privacy when talking about a particularly sensitive subject - their money!

### Solution:

- Empower your marketing team with updated skills, guides, and processes for handling customer data responsibly.
- Boost campaign effectiveness by integrating new data and targeting processes.
- Help your team adapt with guides to new marketing tools.

# Worried about the journey ahead?

Effective data-driven marketing can help finance marketing teams optimise campaigns and enhance growth, especially during challenging economic times.

Partner with us to access the latest marketing technologies and data-driven insights.

Ready to take your brand to new heights?

Call +44 (0)800 019 6813 or [email us](#) to learn how we can help you succeed.

