

Targeting Financial Services

Everything you need to know



4 key steps to targeting Financial Services

01 Research your target market

Take time to understand the issues your target market is facing

Conducting regular secondary and primary research to understand the market landscape will support your proposition and personalised messaging.

Financial Services care about ROI, reducing risk in highly regulated environments and creating a culture of pace, as well as customer experience.

02 Define your target audience

FS covers a breadth of different sectors that all have different priorities

Defining who your offering will be relevant to is key to your marketing plan. You need to be able to speak directly to your audience and resonate with their challenges.

Know and differentiate your Financial Service segments.

Financial Service Segments

Capital Markets:

Asset Management Brokers, Wealth Management, Investment Banking, Retail Banking, Clearing Houses

Insurance:

Life, Liability, Property, Amenity

Non-banking finance company:

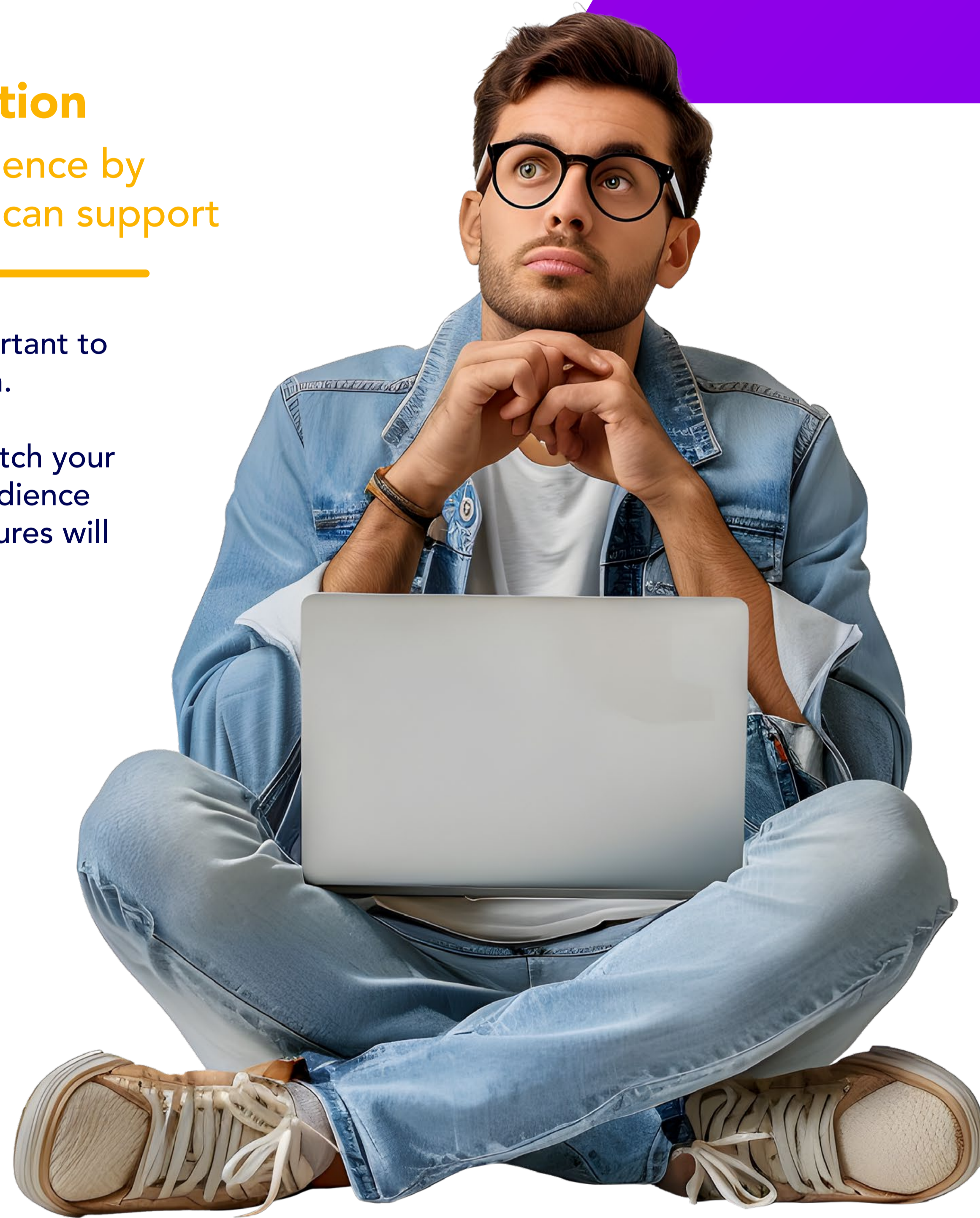
Asset, Finance, Investment, Loan, Payments

03 Establish your value proposition

Find out what pains your target audience by experiencing and establish how you can support

Your offering needs to support your audience's needs — it's important to develop a value proposition that resonates and captures attention.

Remember — don't try and be everything to everyone, clearly match your solutions to your target's pain points, and don't try to tell your audience everything at once. Lead with the business benefits (the tech features will come into play later in the buyer journey).



04 Plan an integrated approach

Consider all elements of marketing to strategically plan how to best communicate with your target audience.

Content remains king and a content strategy provides a consistent drumbeat of the knowledge and insights you have to share. Consider how you can use multiple channels to further your reach, take advantage of social platforms and bring partner marketing into the mix where applicable.

If ABM is the right approach, define who you're targeting and research further into bespoke value proposition that speaks to those targeted accounts.

Book in a virtual coffee with one of our agile marketing experts

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