



Act-On for Banking

Build trust and deliver long-lasting customer relationships

Marketers wanting to move at the speed of today's customers need a marketing automation solution that adapts to the infinite number of customer journeys made possible by today's digital technology. In fact, according to the Digital Growth Institute, "89% of Marketers expect customer experience to be their primary differentiator." We also know that gaining the attention and trust of your customers requires personalized engagement. That is why Act-On cuts through the digital noise and delivers personalized marketing efforts at scale, positioning marketers to realize their growth potential and experience proven success.

"Act-On allows us to punch above our weight in trying to compete with larger financial institutions. With Act-On, we can stay competitive with the biggest players in the market while continuing to provide our head-turning experience."

KYLE DAHLGREN

AVP OF ECOMMERCE, TRUITY CREDIT UNION



SF Fire Credit Union



KEESLER FEDERAL CREDIT UNION



www.act-on.com | 1-(877)-530-1555

Maximize your growth potential using marketing automation

Deliver a personalized approach to optimize customer acquisition and retention

[TruStone Financial Federal Credit Union](#) achieved 83.3% open rates on highly-segmented emails. And Act-On helps TruStone better serve and nurture their customers by easily offering them messages on company updates, financial education and product solutions.

Act-On enables you to leverage behavior insights of prospects and customers to offer relevant personalized messaging with [segmentation](#), dynamic content and [trigger-based email campaigns](#) that lead to more conversions and cross-sell opportunities.

You can also engage customers and encourage loyalty with consistent, timely messaging across all channels using [automated nurture programs](#).

Transform your customer's journey and see better results

Act-On improved [Tower Federal Credit Union's](#) ability to understand and score customers based on their behavior on the website, helping to set it apart from the competition.

With [Website Visitor Tracking](#), you can tune into what interests your known prospects and customers have whether it be a new car, purchasing a home, retirement and more. Marketers can easily build [landing pages](#) to engage customers at a personal level at the right time, and incorporate [lead scoring](#) to identify qualified sales leads and generate higher conversion rates.

Unlock your data to grow business

With Act-On, [Plante Moran's](#) marketing team has experienced stronger collaboration with sales, a more streamlined workflow and an increase in productivity, aided by the tight native integration with their Microsoft Dynamic CRM.

Act-On's [native integration with all major CRMs](#), allows you to leverage data resources aligning marketing and sales to provide a unified view of the customer's journey.

Eliminate regulatory and compliance concerns

Do all of the new marketing compliance laws and the ramifications of being non-compliant have your head spinning? Industry experts agree that marketing automation software offers one of the best solutions for mitigating the burden of an evolving regulatory environment on marketing efforts. Here at Act-On, we have you covered.

In the current regulatory environment, proper [consumer opt-in](#) early in the buying process is critical. With Act-On you can stay on top of it along with planning, executing and better controlling all outgoing communications. You can save time as well by using [compliance approved email templates](#) when replicating and updating content.

Make data-driven decisions

With Act-On, [Tower Federal Credit Union](#) uses the data and analytics tools to track member activity, better understand their behavior and preferences, and provide them with the most relevant messaging.

[Act-On reporting and analytics](#) tracks and measures all key marketing activities such as campaign performance, funnel reporting and revenue attribution, enabling you to quickly view which campaigns are resonating with your targeted audience and generating results.

Take a video tour



Marketing Made Personal

Act-On is your differentiator for gaining visibility into a customer's needs and delivering a personalized and value-packed approach.