

ActionIQ for Financial Services

The ActionIQ Customer Experience Hub (CXH) enables financial services organizations to shift to a digital-first ecosystem and create real-time personalized experiences. By providing all teams with direct but governed self-service access to customer data, businesses can reduce complexity and drive seamless experiences across all touchpoints. With ActionIQ, financial services firms can execute experiences that drive acquisition, engagement and retention.

Why ActionIQ

Select the CXH module needed based on your individual business requirements:

Customer Data Platform

Centralized platform combining data from any source, resolving customer identities and activating data across all touchpoints.

Journey Management

Automated real-time recommendations and next-best-action models empowering marketers to drive value across touchpoints.

Audience Center

Intuitive user interface allowing business users to independently access and activate audiences in real time within a controlled and permission-based user interface.

Real-Time Customer Experience

Powerful automation enabling marketers to discover audiences and orchestrate experiences at scale and in real time.

“We selected ActionIQ for its ability to integrate easily, make it possible for us to understand our customers better and to make personalized product offers along the customer journey”



Gui Telles
Chief Marketing Officer (CMO)
and Chief Strategy Officer (CSO)

PicPay

“We can no longer spend days defining audiences and moving levers and knobs to launch a campaign. Having all of our data consolidated and being able to push audiences to platforms and learn something fast is really powerful for us. ActionIQ allows us to streamline, make decisions and test and learn quickly.”



Verlyn Fischer
Principal Product Manager

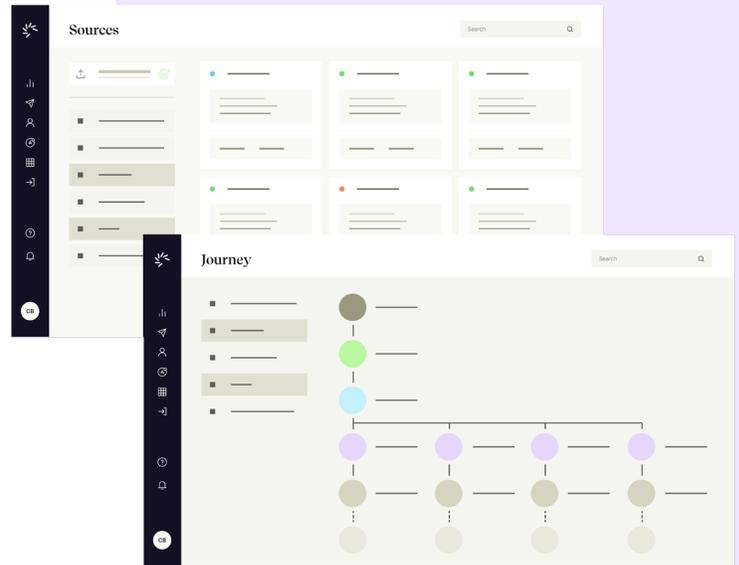
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What Can ActionIQ Do for You?

Every touchpoint is an opportunity to engage your customers. Financial services organizations partner with ActionIQ to uncover real-time, actionable insights and deliver modern and personalized experiences that are proven to drive customer value.

KEY CAPABILITIES

- ✔ Identity resolution and enrichment
- ✔ Complete customer profiles
- ✔ Self-service data management
- ✔ Real-time insights and segmentation
- ✔ Predictive analytics and next-best-action
- ✔ A/B testing and measurement
- ✔ Omnichannel activation



Use Cases

Financial Services organizations use the ActionIQ CXH to operationalize their customer experience strategy, as well as orchestrate and activate journeys across the entire customer lifecycle. With ActionIQ, teams have a centralized hub that enables them to access insights and activate experiences in real time.

Identify Anonymous Prospects. Capture unknown web traffic and trigger experiences that incentivize visitors to identify or re-engage through our flexible integrations with identity providers, like Merkurly.

Seamless Customer Journeys. Orchestrate real-time campaigns across all channels, from branch, call centers, direct mail to paid media and website interactions.

Product Cross-Sell. Drive cross-sell at scale by identifying life events or audience affinities for specific products, rewards or promotions.

Enhance Engagement Through Personalized Incentives. Offer personalized promotions based on the customer's behaviors, life events, protection needs, spend or risk tolerance.

Deepen Customer Relationships. Provide internal stakeholders with the ability to view and explore customer data, from banking history to call center interactions.

Create Automated Engagement Campaigns. Use data to automate communications based on customer's browsing history, demographics, spend or credit.

Media Targeting Optimization. Increase media targeting accuracy by identifying clients with a high need or affinity to buy new policies, sign up for new credit cards or purchase add-on services.

Increase Customer Retention. Build proactive renewal journeys for customers who are at risk of churn.

Industry Leaders Choose ActionIQ

