

WHY FINANCIAL SERVICES BRANDS STRUGGLE WITH IDENTITY MANAGEMENT

And what they can do about it.



In order for financial services brands to understand and react to what customers want, they need an identity management program that recognizes each person across every interaction with their brand.

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But [this research](#) from Forrester Consulting commissioned by Epsilon shows that fewer than half of financial services brands can do it.

Learn what's stopping financial services brands from truly knowing each customer—and how they can improve their connection.

Financial services brands want to deliver better customer experiences.



Even though 64% of financial services brands have had an identity program for over a year, they're still struggling to recognize people across channels and provide the seamless experiences their customers want.

 **52%** can't prove marketing performance and measurement

 **52%** can't reach the right audience

 **46%** can't optimize online campaigns

Why aren't financial brands seeing results from their current identity programs?

68% of marketers say their identity program provides excellent customer support

But only **36%** see an increase in customer lifetime value

They aren't consistently measuring their marketing to prove what's working.

36% of financial services brands use identity resolution to measure their marketing

26% of financial services brands use identity resolution to fuel attribution analysis

Financial brands are struggling with identity resolution. What does that put at risk?

messaging the correct person across devices, browsers and touchpoints **68%**

recognizing reachable customers online **68%**

the ability to maintain an accurate customer profile over time **64%**

meeting customer privacy regulations and opt-outs **50%**

the amount of addressable customers a marketer can reach **50%**

What results have financial services brands seen from a strong identity management program?

36% saw more effective marketing measurement

28% improved their identification of ad fraud

24% were able to reach the right customer with personalized content

24% better adhered to privacy controls and opt-outs

28% got the right frequency of marketing messages for customers

Advancing your identity program will help you to better deliver against your goals, including improving customer satisfaction and increasing cross-sell and upsell opportunities.

Learn more about how identity management helps financial services brands in our full report: [Improve Customer Experience and Optimize with Identity Resolution: A Spotlight on Financial Services](#)