

# HOW A FINANCE INSTITUTION BOOSTED NEW ACCOUNT CREATION BY LEVERAGING DATA-DRIVEN MARKETING

## > EXECUTIVE SUMMARY

In a dynamic 90-day marketing campaign, our agency demonstrated exceptional proficiency in leveraging AI-driven strategies to significantly enhance account creation for a client in the financial sector, specifically within the realms of home equity lines of credit and financial credit advertising. Employing sophisticated audience targeting tactics and AI enrichment via Trade Desk, we achieved a remarkable increase in new account sign-ups, evidencing our capability as a premium partner.

## > BACKGROUND

Our client, operating in the competitive financial services sector, aimed to increase their customer base by boosting the number of new account creations. With a monthly marketing budget of \$50,000, the goal was to optimize spend and maximize outcomes within a 90-day framework.

### CHALLENGES



Intense Competition



Precise Audience Targeting



Sub-optimal Media Performance



AI-driven Optimization



Strategic Deficiency



Scalable Approach

## > CHALLENGE

The primary challenge was to scale account creation efficiently while maintaining a consistent budget. The financial services market is saturated and highly competitive, making it imperative to identify and target potential customers precisely. Initially, the account creation numbers were modest, reflecting the need for a sophisticated approach to audience targeting and engagement.

## > SOLUTION

Our strategy revolved around utilizing 1st party and 3rd party Audience targeting and AI capabilities to consistently enhance the reach and target the right people. This approach included:



### AUDIENCE CREATION

Crafting detailed profiles of ideal customers based on existing data.



### LOOK-ALIKES

Identifying and targeting new users who closely resemble our client's current customers.



### TARGETING TACTICS

Employing advanced targeting methods to reach potential customers more effectively.



### CREATIVE UPDATES AND TARGETING ENRICHMENT

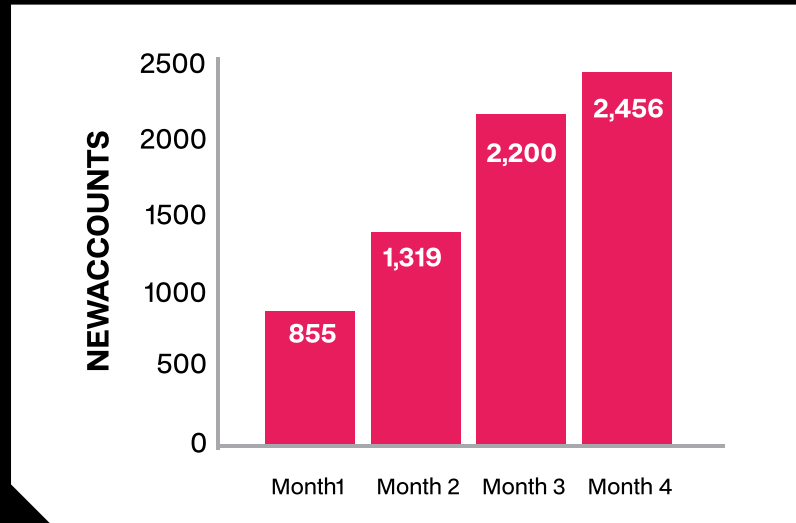
Continuously refining our advertising creatives and targeting parameters based on AI-driven insights and performance data.

This methodological approach allowed for a dynamic campaign that adapted and evolved over time, leveraging AI to learn from ongoing results and optimize accordingly.

## RESULTS

The campaign delivered impressive results over a four-month period:

This steady increase in account creation showcases the effectiveness of our AI-driven tactics and our ability to scale results significantly while adhering to the set budget.



## RESULTS



1.5X

Increase in Account Creation (Average MoM)



6830

New Accounts Created



3X

Reduction in CAC

## HIGHLIGHT

Successfully drove down customer acquisition expenses by almost threefold over a period of three to four months. Strengthened messaging consistency to improve efficiency in other channels.

## CONCLUSION

The campaign not only surpassed the initial goals set by our client but also underscored our agency's expertise in leveraging technology to achieve substantial growth in the financial services sector. Our approach demonstrates a clear competitive advantage in utilizing AI for audience targeting and campaign optimization, making us a valuable partner for advertisers aiming to enhance their customer acquisition efforts in the financial industry. By turning insights into action and consistently refining our strategies based on data-driven learning, we offer our clients unparalleled growth opportunities and a path to achieving their marketing objectives efficiently and effectively.