

# Strategies to overcome the six biggest challenges in wealth management marketing

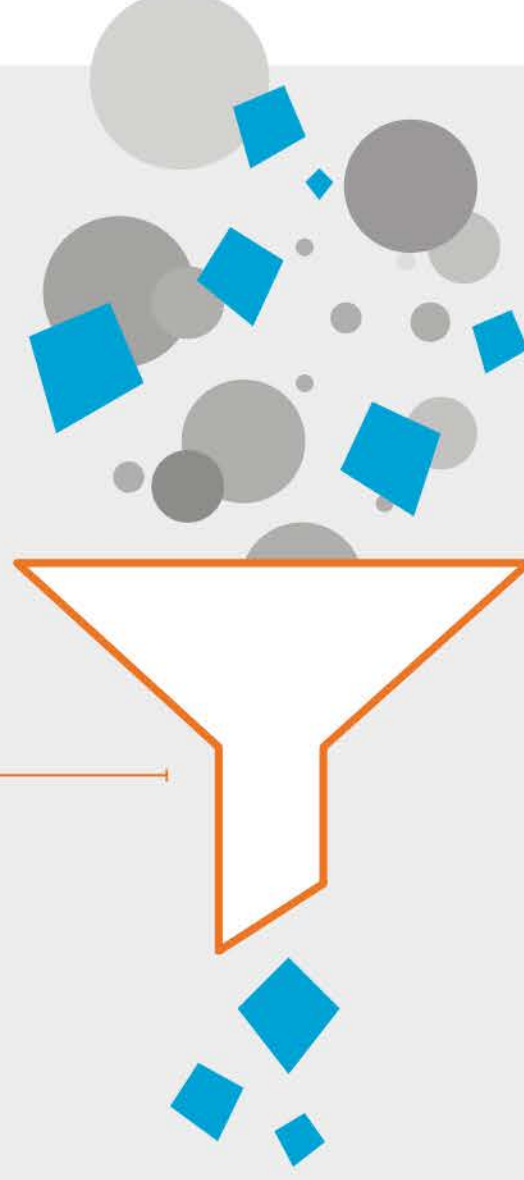
## CHALLENGE #1

### Poor data quality.

Fragmented data comes from different systems in so many different formats.

#### STRATEGY

Take advantage of the latest comprehensive data aggregation, cleansing and validation technologies.



## CHALLENGE #2

### Lack of insight.

Even the best organizations struggle to measure campaign effectiveness and ROI.



#### STRATEGY

Look for platforms that can deliver:

- Automated feedback
- Response capture
- Traffic analytics
- Segmentation & modeling

## CHALLENGE #3

### Disengaged audience.

It's not easy to generate leads, likes and clicks.



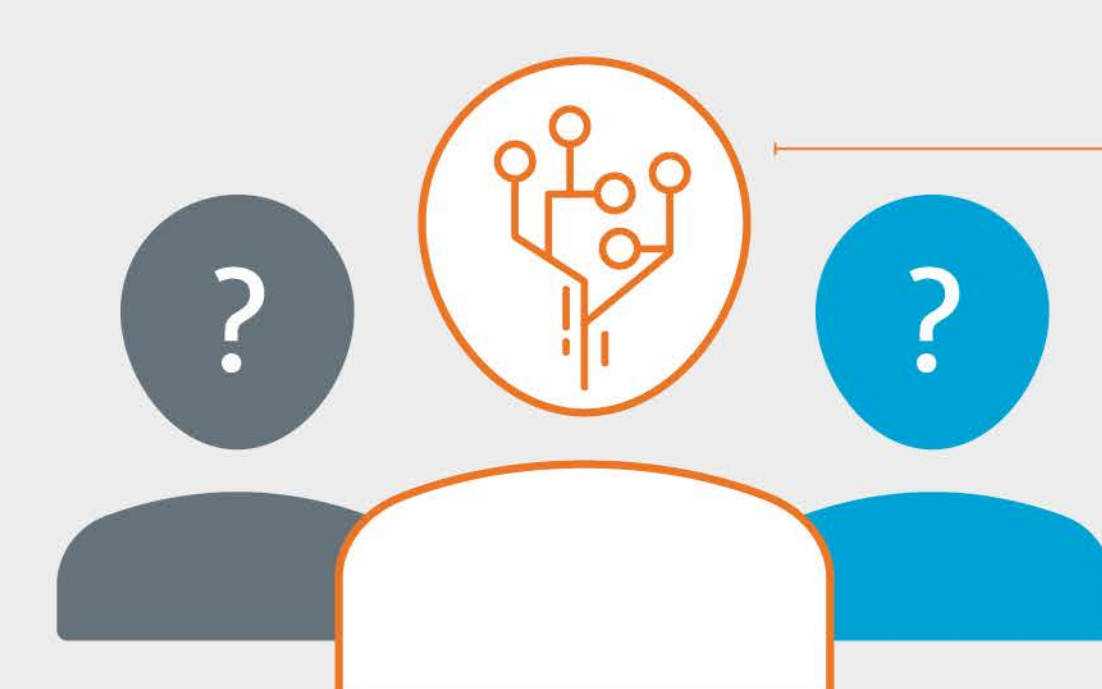
#### STRATEGY

Try leveraging outsourced content. Top vendors deliver huge libraries full of engaging, relevant material.

## CHALLENGE #4

### Indecision.

Some teams find it difficult to effectively prioritize resources.



#### STRATEGY

Machine learning and artificial intelligence enable marketing teams to send the right message to the right prospect at the right time. Hone your acquisition strategy with:

- Prospect-fit analytics
- Recommendations engine

## CHALLENGE #5

### Inefficiency.

Too much time and too many resources are spent on routine tasks.



#### STRATEGY

Install an automated campaign management platform.

- Connect with clients via channels they prefer.
- Engage prospects at just the right cadence with algorithm-based distribution.

## CHALLENGE #6

### Incompatible platforms.

Disconnected platforms stitched together from multiple vendors are holding you back.



#### STRATEGY

Streamline and synchronize operations by partnering with a vendor who can deliver a comprehensive, integrated suite of solutions.

## THE SOLUTION

### One platform. Endless opportunity.

Step up to next-generation marketing intelligence with data-driven technologies designed to captivate clients and accelerate growth.

- IDENTIFY and attract top prospects
- CREATE relevant, personalized experiences
- EXPAND and enrich relationships
- MEASURE results to optimize impact



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