Use Case

ENSURE BRAND COMPLIANCE AND INTEGRITY
with PFL's Personal Marketing Center

Financial Services companies struggle to understand and control marketing efforts by financial professionals (FPs) in the field. As FPs reach out to potential customers, they craft their own marketing messages often without any support from Marketing.

Financial planners do their best, but they aren't marketers and customers face a fragmented brand experience. Creating content and email templates is slow, laborious, and keeps them from doing what they do best—sell.

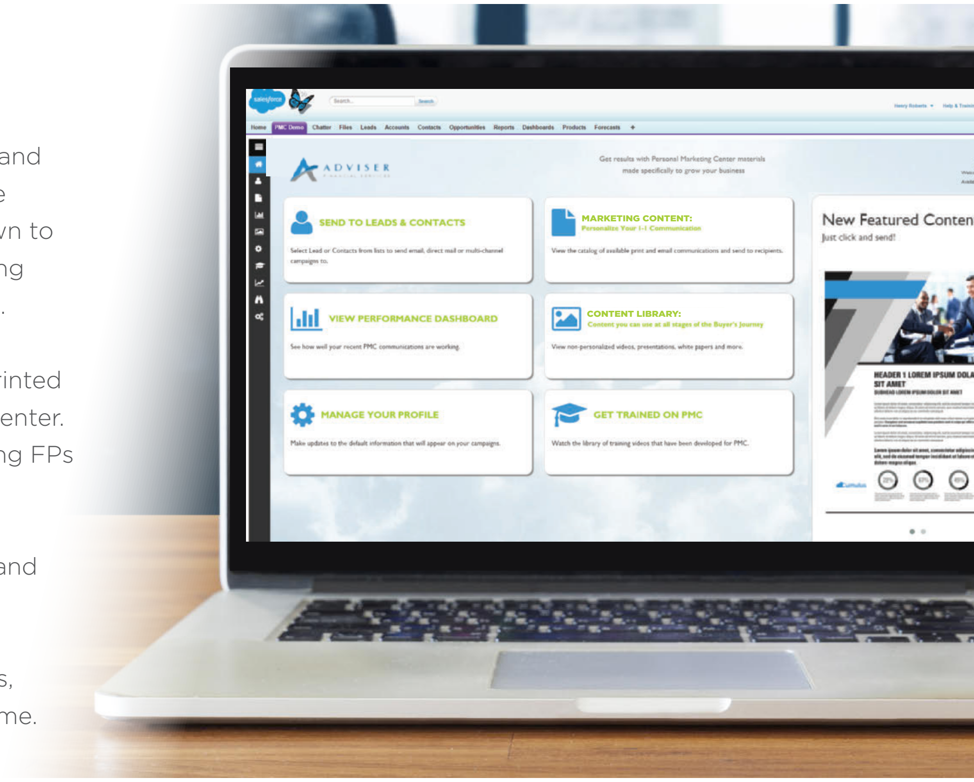
Here's how financial companies are keeping their brand intact, empowering their FPs and increasing efficiencies that drive real customer experience.

The Solution

PMC integrates directly into Salesforce. This means marketing and sales teams do not have to learn a new tool, leading to rapid adoption of the PMC across the enterprise.

The solution offers a bevy of improvements:

- Flexible templates for developing personalized collateral such as email and direct mail sends. The templates were created by Marketing and locked down to preserve brand compliance while being customized by financial professionals.
- Print collateral can be ordered and printed from within the Personal Marketing Center. Print orders are fulfilled by PFL, freeing FPs to focus on growing their business.
- PMC bridges Salesforce Sales Cloud and Salesforce Marketing Cloud to track prospect behavior and suggest how FPs should engage specific prospects, sending the right piece at the right time.



The Resolution

With PMC, financial service companies can enforce brand compliance and integrity across the enterprise. Seamless access to preexisting marketing materials frees FPs from recreating content and empowers them to focus on bringing in new business instead. Most importantly, FPs are able to create the kind of experience that turns prospects into customers and customers into advocates.

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