

# Every FinServ Customer Is Unique.

## Know what makes them click with Contentsquare for FinServ.

From a post-Covid increase in digital penetration and the emergence of new and innovative payment methods to new regulations constraining FSI actors and emerging social consciousness, the FinServ space has seen plenty of upheaval in recent years. It has never been more important to understand and cater to the constantly evolving FinServ customer.

But for many FinServ brands, understanding exactly what's happening across the customer journey is challenging. While brands may understand where their customers struggle—perhaps at application initiation or form completion—few brands understand why. This makes it hard for them to deliver online experiences that truly meet their audience's needs and convert prospects into lifelong, happy customers.

Contentsquare empowers FinServ companies with an unprecedented understanding of the customer experience. With intuitive, AI-driven technology that reveals each customer's behavior, intent and feelings, we enable FinServ businesses to deliver more human experiences while ensuring privacy and accessibility. This means faster growth, greater agility, better trust and happier customers.

---

**Over 1,000 enterprise customers including leading FinServ brands trust Contentsquare**



# Contentsquare for FinServ

Contentsquare moves beyond traditional analytics to offer your teams an unprecedented understanding of your customers. This enables you to deliver better online experiences—fast and at scale. We do this through understanding, action and trust.



## Understanding

Capture a complete picture of customer behavior and understand the quality of the experience delivered

### Understand how customers navigate.

Visualize how customers navigate different pages and search for products and services. See where they drop off in the journey and understand which search terms, filters, and products resonate.

### Improve the application process, product upsells and cross-sells.

Understand how customers navigate to and through your quote and application pages, such as which product pages lead to increased applications and what challenges they experience while applying. Monitor the experience to detect where there are anomalies, quickly eradicate frustrations and maximize your potential to turn visitors into converted customers. Understand the quality of the user flows and what's working and what's not. Maximize your potential to turn a visitor into a paying customer.

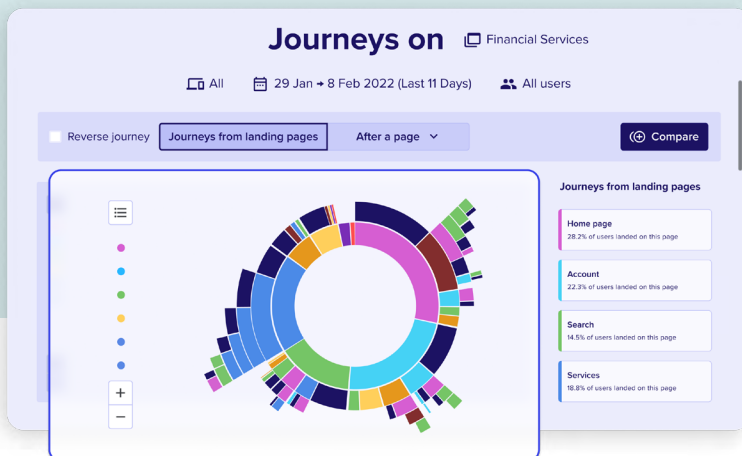
### Deliver experiences that retain existing customers.

Understand how logged-in customers navigate and respond to your digital experience. Understand if they can complete payments, conduct transfers, get quotes, file claims and perform other activities quickly. See where they experience challenges, drop off or respond favorably to help you build better relationships and experiences.

## Action

Align and empower your team to take intelligent action on what matters most

Contentsquare's **Customer Journey Analytics** gives you insights on the traveler's journey on your site - from point of entry to point of exit.



### Drive digital experience and technology transformation

Legacy technologies are commonplace in financial services businesses, but are often brittle and costly to maintain. This leads to a lower rate of return on future investments and acts as an obstacle to delivering the innovative experiences customers have come to expect. Contentsquare helps you get to the root cause of why customers behave as they do, then validates to what extent these behaviors are driven by technology choices in your organization—such as limiting legacy CMS or payment gateways—which create friction in the checkout. You can then use these customer insights to build a business case to drive technology and digital experience transformation.

### Maximize investment decisions in your tech stack

Various systems comprise the FinServ tech ecosystem, including CRMs, CMS, VoCs, A/B Testing and many more. Contentsquare gathers customer data from all these different systems and enriches them with unique, high-fidelity insights to make your entire ecosystem smarter. This means you can enjoy a greater return on your financial tech stack investment and invest more in the platforms that are delivering results.

### Align your team around what matters most

Cross-functional alignment (particularly among leadership) is often a key challenge due to competing priorities and difficulty in justifying investment areas. However, alignment around a common goal is crucial in driving competitive travel experiences. With Contentsquare, all teams (from analytics and product, to eCommerce, marketing, IT and support) have access to the same customer narrative, enabling them to work together to address opportunities and agree upon where to invest to deliver a better digital experience—fast and at scale.

### Connect the dots on digital performance

Assessing and reporting on how financial services digital experiences are performing are critical to success. Often times this information is scattered across different systems or hard to find, making it challenging to understand what is happening and why. Contentsquare enables you to connect the dots on digital performance, to understand root cause and prioritize improvements on site speed and performance, technical issues, product performance, adherence to compliance, assessing risk and managing customer feedback.



# Trust

Build trust with customers by delivering private, secure and accessible experiences



ContentSquare **Zone-Based Heatmaps** give you intuitive visualizations of your customer behavior by overlaying key UX metrics directly onto your website.

## Personalize your customer's experience without sacrificing privacy.

Customers want personalized experiences throughout the customer journey—from ordering a new credit card to finding out which savings account is right for them—and they want it without having to provide personal data upfront. ContentSquare enables you to achieve personalized experiences without sacrificing privacy through its non-reliance on cookies and industry-leading Digital Trust Assured package of privacy, security and data expertise.

## Deliver inclusive experiences that better meet the needs of customers.

Customers are increasingly looking to do business with companies that reflect their values, with digital inclusivity being a top priority. ContentSquare enables you to deliver more inclusive experiences through our identification of customer segments with accessibility needs and clarity on how to design accessible experiences for as many customers as possible.



"ContentSquare is at the heart of our decision-making process. Since its introduction to the bank, it's rapidly become a key tool for prioritizing wins for the business and the customer. Without it, we would have missed a lot of opportunities."

**Nathan King, Digital Experience Manager at NatWest**



"ContentSquare is one of the most important tools I have to make design decisions. I base much of my design work on the data I get from ContentSquare and then also use it to test whether my pages are doing what I thought they would. I use ContentSquare daily, and I'd be lost without it."

**Rosie Dent-Spargo, UX Designer at Leeds Building Society**

