

A MODERNIZED APPROACH TO SALES & MARKETING IN

# Banking

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A guide for revenue teams to create and convert more pipeline in Banking

# Misaligned Sales and Marketing Efforts

Sales and Marketing teams at most banks are working towards the same goals but lack the data and tools to properly work together to **focus on growing share of wallet with the right businesses.**

Marketing teams run broad-based campaigns targeting businesses with firmographic (industry, revenue, etc.) data, whereas relationship managers often focus on predefined account lists set at the beginning of the year.

Both teams are missing out on a huge opportunity to focus both sales and marketing teams on the businesses that are actively researching their solutions, but not talking to relationship managers or de-anonymizing themselves through marketing channels (we call this anonymous activity the “dark funnel”).

That’s where **6sense Revenue AI** comes in. In this guide, we’ll show you 3 simple use cases for both marketing and sales, and exactly how they’d work for your bank.

# The Traditional Approach No Longer Works

**70%**

of the client's journey is done anonymously

**3%**

of website visitors fill out forms

**10%**

of your targets are in-market to buy

**84%**

of deals are won by the first firm a client contacts

**UNKNOWN DEMAND**

Missing Out on Opportunities

**NOT SUSTAINABLE**

Team **Burnout**



**POOR TIMING**

Falling Conversation Rates

**LIMITED RESOURCES**

Creating **Inefficiency**

# Focus Resources on Clients that are Ready to Engage



- Total In-market Clients
- Known In-market Clients

If we just knew **when clients were *In-market* (looking for solutions)**, sales and marketing would be so much easier.

When clients are  
in-market

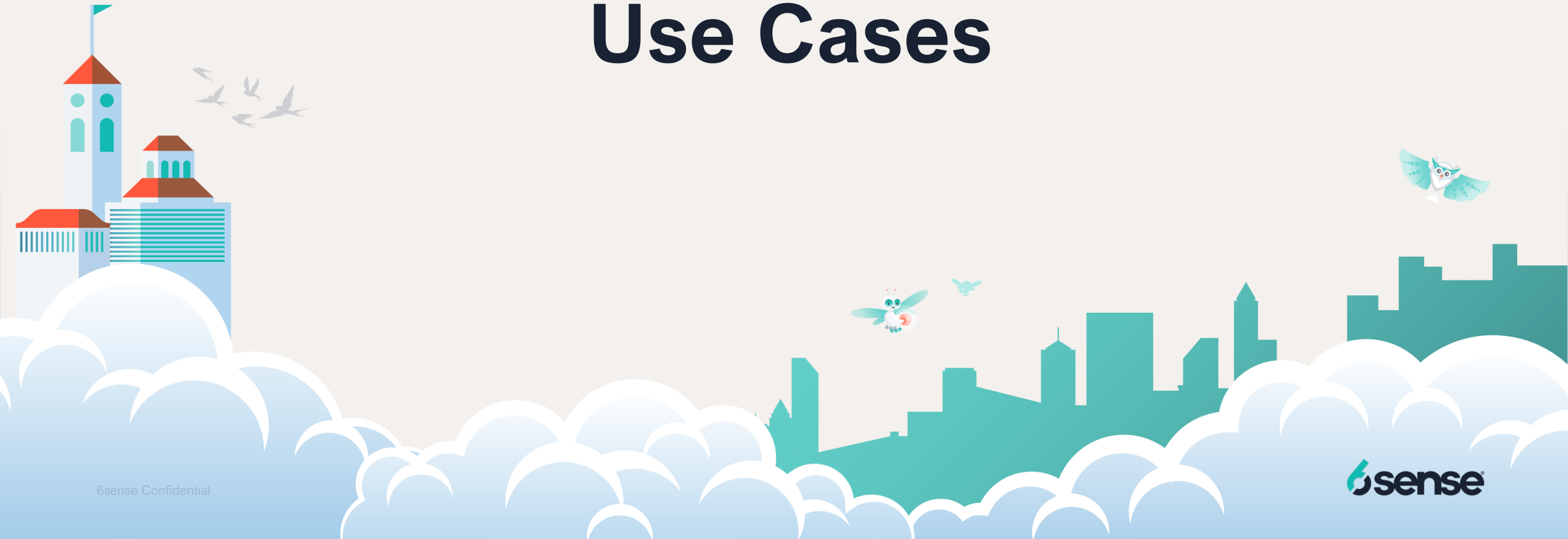
Which products  
they're interested in

Who to contact

How to contact them

6sense pulls together 3rd party internet research (what keywords or topics people are researching on the internet) with data that you already own (website, CRM), and matches it at the company level, to guide you on...

# Use Cases



# Top 6 Plays for Banking

MARKETING

## Play #1

Measure and improve marketing efficiency by targeting businesses when they're in-market

## Play #2

Educate businesses about the products they actually need

## Play #3

Find and create awareness with businesses that haven't heard of your institution

SALES

## Play #1

Target accounts more effectively with richer CRM data

## Play #2

Prioritize your time with alerts and recommended actions based on client and prospect activity

## Play #3

Prepare for meetings with the right message, right products, and right content to drive cross-sell

# Play #1: Measure and improve marketing efficiency by targeting businesses when they're in-market

## EXAMPLE



**Problem:** For your always-on advertising campaigns, you might be targeting all CFOs in a specific industry or geography.



**Impact:** Previously, marketing campaigns have been broad and generalized with low conversion rates.



**Solution:** Now, you can limit the audience exclusively to the businesses that are actively researching banking products and target them more aggressively with advertising.



**Result:** Not only does your ad spend lead to more results, but you can measure those results by tracking how many of those specific businesses turn into opportunities.

**Add Filters**

**CRM**

- Salesforce: Account
- Salesforce: Contact
- Salesforce: Lead

**Map**

- Marketo: Lead

**6sense AI**

- 6QA: Current Status

**Take Action**

- View Performance Report
- View Connections (NaN)
- Sync to Google Ads
- Sync to LinkedIn
- Sync to Facebook
- Create Orchestration
- Create Alerts
- Publish Segment

**Advanced Targeting**

▼ **Persona**

I want to target

Chief Investment Officers

or

Investment Analysts

or

Investment Committee

Estimated Daily Spend  
\$1,500 - \$2,000

Business	Visitors	Keywords	Activities	Latest Activity	Latest Impression
<b>Small Business 1</b> United States	95	56	769	September 27	September 27
<b>Small Business 2</b> United States	130	43	870	September 23	September 23
<b>Small Business 3</b> United States	80	24	539	September 20	September 20

# Play #2: Educate businesses about the products they actually need

## EXAMPLE



**Problem:** Your digital ad campaigns have a more generic focus on your bank.



**Impact:** You'd like to have more specific campaigns centered around product offerings but you're not sure which products clients are in-market for.



**Solution:** Power ad campaigns with customer keyword research from 6sense. Track research being conducted online around your product offerings like B2B payments or corporate cards to target clients with the most relevant offering.



**Result:** The right people see these ads about your new product features, low rates, and even click through directly to a comparison with a competitor. This gets people onto your website and interested in your product.

### Top Generic Keywords

CASH BACK REWARDS

PAYMENTS

MORTGAGE

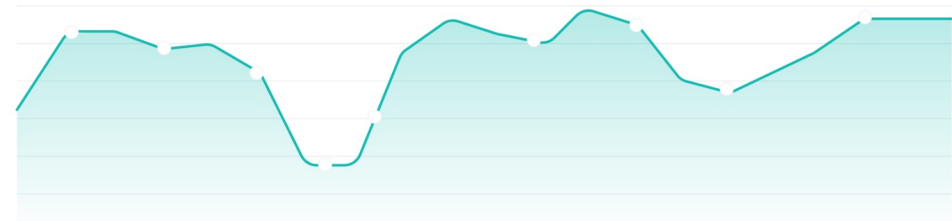
INTEREST RATE RISK

EQUIPMENT LOAD

#### Top Keyword Groups

Credit Cards	45	<div style="width: 45%;"></div>
Small Business Loans	42	<div style="width: 42%;"></div>
Payment Products	30	<div style="width: 30%;"></div>
Spend Management	25	<div style="width: 25%;"></div>

ACCOUNTS (59) PREDICTIVE ANALYTICS BEHAVIORAL ANALYTICS PROFILE ANALYTICS



Branded Keywords	Generic Keywords	Research Activities	Accounts
25	208	7,488	61



## Play #3: Find and create awareness with businesses that haven't heard of your institution

### EXAMPLE



**Problem:** Businesses are researching loan rates on NerdWallet and reading articles comparing banking solutions on CNBC.



**Impact:** You don't have a relationship with many of them and they're not in your CRM.

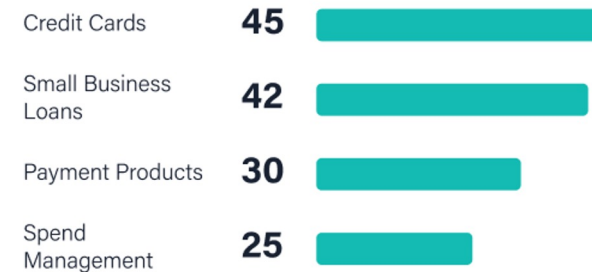


**Solution:** Target them with awareness advertising that talks about your competitive advantage compared to your most common competitor.



**Result:** A large majority of these businesses now engage in conversations with your bankers.

#### Top Keyword Groups



#### Top Branded Keywords

LOCAL BANK A

LOCAL BANK B

LOCAL BANK C

LOCAL BANK D

NEOBANK A

NEOBANK B

# Play #1: Target accounts more effectively with richer CRM data

## EXAMPLE



**Problem:** You're a relationship manager and see your dashboard within your CRM on a crucial account is showing intent.



**Impact:** Previously your talks have been more surface level and haven't moved the needle.



**Solution:** You read about what they're researching and schedule time with each of them this week.



**Result:** Now those conversations are more than surface level check-ins and highly likely to convert to opportunities.

The screenshot shows the 'Account Detail Page' for Visa, Inc. in a CRM system. The page includes the following information:

- Account Information:** VISA Visa, Inc., Foster City, California, United States. Status: 6QA Warm Account Maintain Engagement.
- Contact & Location:** Corporate Phone: +1 650-432-3200; Address: 900 Metro Center Boulevard,...
- Company Details:** Employee Range: 10,000+; Revenue Range: \$5B+; Funding: <1M; Website: visa.com; Company Type: Public; NAIC/ SIC: 52311/6799; Industry: Financial Services (Payments); Product & Services: Payment Solutions +9.
- Intent Keywords:**
  - Branded Keywords (6 Items):** linkedin sales navigator (7), Account Score (3), Competitor Name (2), 6sense (2), ABM (2), Competitor Name (1).
  - Generic Keywords (101 Items):** predictive analytics (79), marketing performance (54), sales AI (41), technology intelligence (32), sell ai (31), market intelligence (30), sales prediction (27), sales pipeline (25), customer data management (25), account data (19), ai powered sales (16), account targeting (15).
- Navigation:** Highlights, Timeline, Intent (selected), Web Activities, Tech & Signals, Persona Map, Company Hierarchy.

Account details page, embedded within your CRM, display relevant account information, like intent keywords researched and which web pages are being visited, where your sellers already work.

## Play #2: Prioritize your time with alerts and recommended actions based on client and prospect activity

### EXAMPLE



**Problem:** You usually plan your week on Mondays and know exactly which businesses you're going to reach out to and meet with.



**Impact:** You get an alert that a small business that's been holding out on discussing foreign exchange is researching the product and going to your website.



**Solution:** You call them immediately just to check in and schedule a time to talk tomorrow.



**Result:** The talk proves timely and productive – next steps are *finally* scheduled.

The screenshot displays the 6sense 'Daily Top Accounts' dashboard. At the top, it shows 'Top Accounts today: 13' and a link to view all hot accounts on Salesforce dashboards. Below this, there are four key metrics: 'NEW HOT ACCOUNTS' (0), 'RECENT WEB VISITS' (10), 'RECENT INTENT ACTIVITIES' (3), and 'RECENT CONTACT ENGAGEMENT' (0). A section for 'Small Business' (www.smallbusiness.com) is highlighted, showing '6QA' and 'RECENT WEB VISITS'. It also displays 'Buying Stage: Decision', 'Profile Fit: Moderate', and 'Account Reach: High'. Further down, it lists '5 Web Visits - 0 known contact, 5 anonymous' with specific URLs and visitor counts. At the bottom, it shows '16 Keywords - 121 times researched by 25 anonymous users' with a list of keywords like 'ABM (7)', 'Account Score (1)', 'cdp (77)', 'account data (14)', and 'data cleansing (4)'. Navigation buttons for 'View on 6sense' and 'View on Sales Intelligence' are at the bottom.

# Play #3: Prepare for meetings with the right message, right products, and right content to drive cross-sell

## EXAMPLE



**Problem:** You haven't met with one of your clients in a year, but have an upcoming meeting scheduled.



**Impact:** You see they've been researching corporate cards for T&E online, but don't use your corporate card product.



**Solution:** Before the meeting, you bring information on the product and roughly underwrite their credit limit, so that you're over-prepared for the meeting.

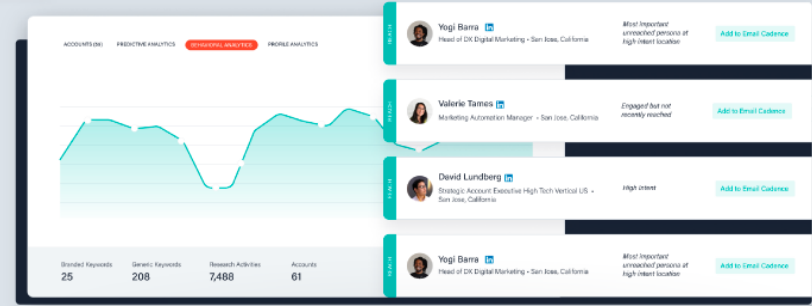


**Result:** Thanks to your preparation and research insights, the conversation around your corporate card product goes smoothly and the client is interested.

The screenshot displays the 'Account Details' page for a client in Purchase, New York, United States. The account is marked as a 'Hot Account' and 'Maintain Engagement'. Key details include: Corporate Phone (+1 914-249-2000), Employee Range (10,000+), Revenue Range (\$5B+), and Website. The account is categorized as 'Public' with NAIC/SIC 522210/6153 and Industry 'Financial Services (Payments)'. A 'Generic Keywords' section is highlighted with a red circle, showing 45 items such as 'first party data (11)', 'predictive advertising (9)', 'technology intelligence (9)', 'sales pipeline (5)', 'target accounts (4)', 'account targeting (4)', 'sales AI (4)', 'data append (3)', 'track intent (3)', 'account data (3)', 'pipeline management (3)', 'marketing analytics (3)', 'technology insights (3)', 'interest data (3)', 'lead qualification (2)', 'icp (2)', 'go to market (2)', 'sales forecasting (2)', 'marketing', 'sales pipeline plans', 'ai and marketing', and 'in-market'.

*6sense Revenue AI for Sales allows reps to see top pages visited, keyword activity where “corporate cards for T&E” could be tracked in this play, and much more.*

## ACTIVATION LAYER



## Revenue AI™ for Marketing

## Revenue AI™ for Sales

## INTELLIGENCE LAYER

**WHO**  
Anonymous Buyer Intelligence

**WHEN**  
Predictive Intelligence



Data Cleansing & Connecting

**HOW**  
Recommendation Intelligence

**WHAT**  
Generative Intelligence

## DATA LAYER

Web Activity

Company

Intent

People

Pre-Intent



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