A MODERNIZED APPROACH TO SALES & MARKETING IN

Banking

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

6sense

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

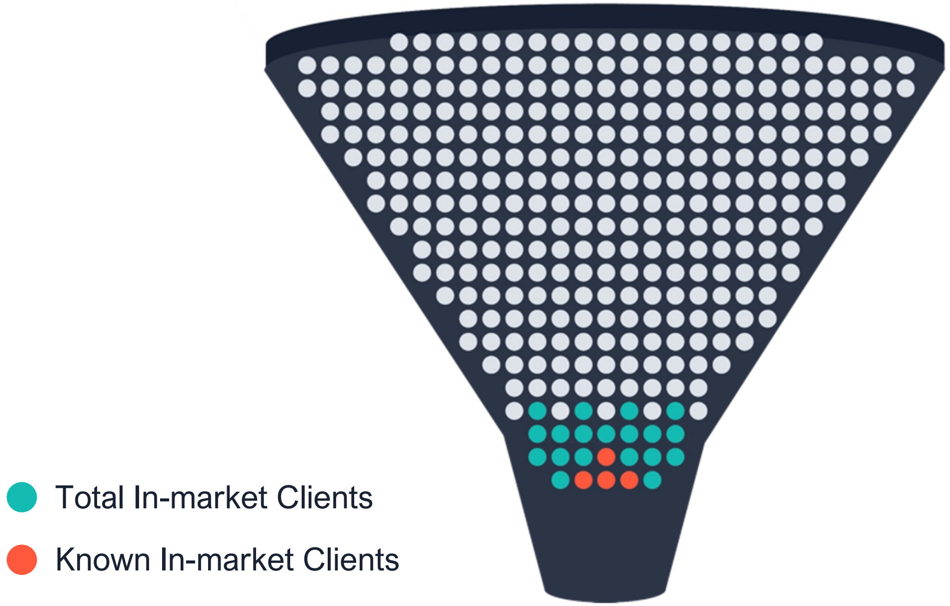
UNKNOWN DEMAND
Missing Out on **Opportunities**

NOT SUSTAINABLE
Team **Burnout**

POOR TIMING
Falling **Conversation Rates**

LIMITED RESOURCES
Creating **Inefficiency**

Focus Resources on Clients that are Ready to Engage



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

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

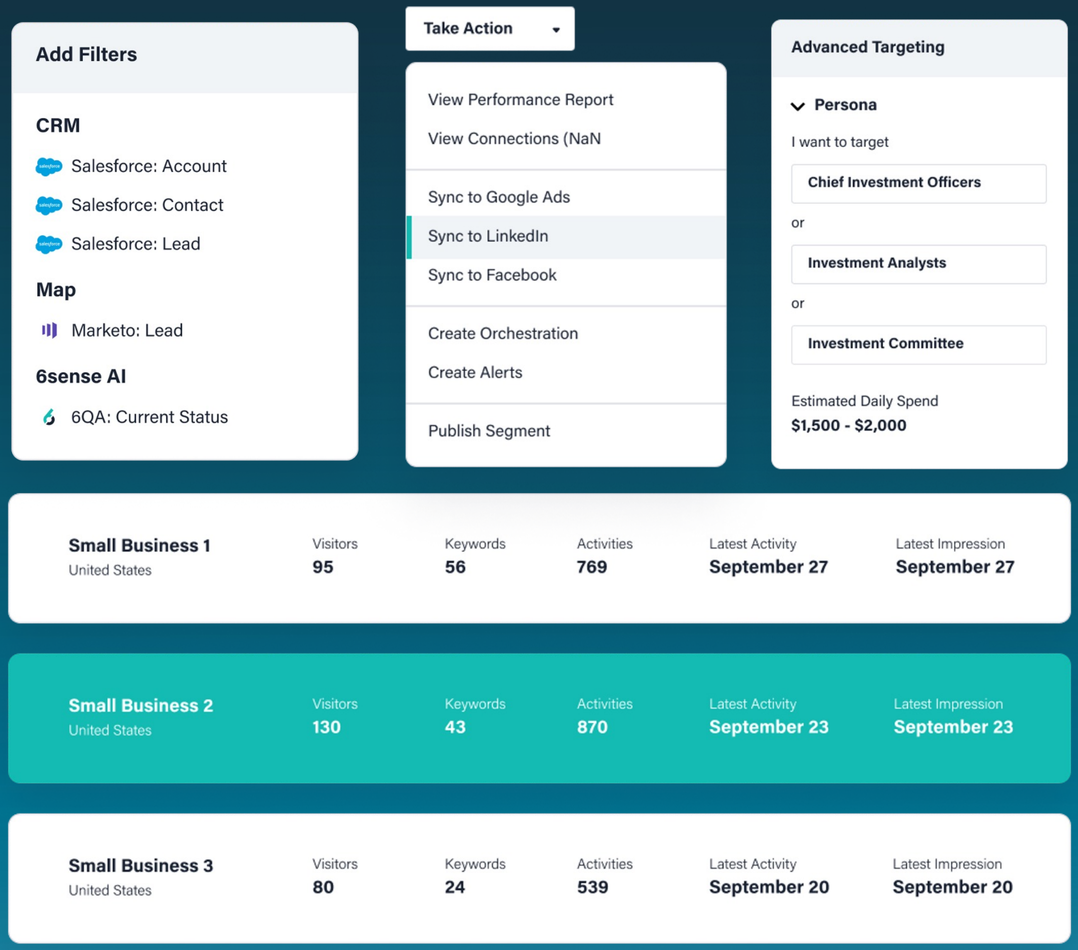
EXAMPLE

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.



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

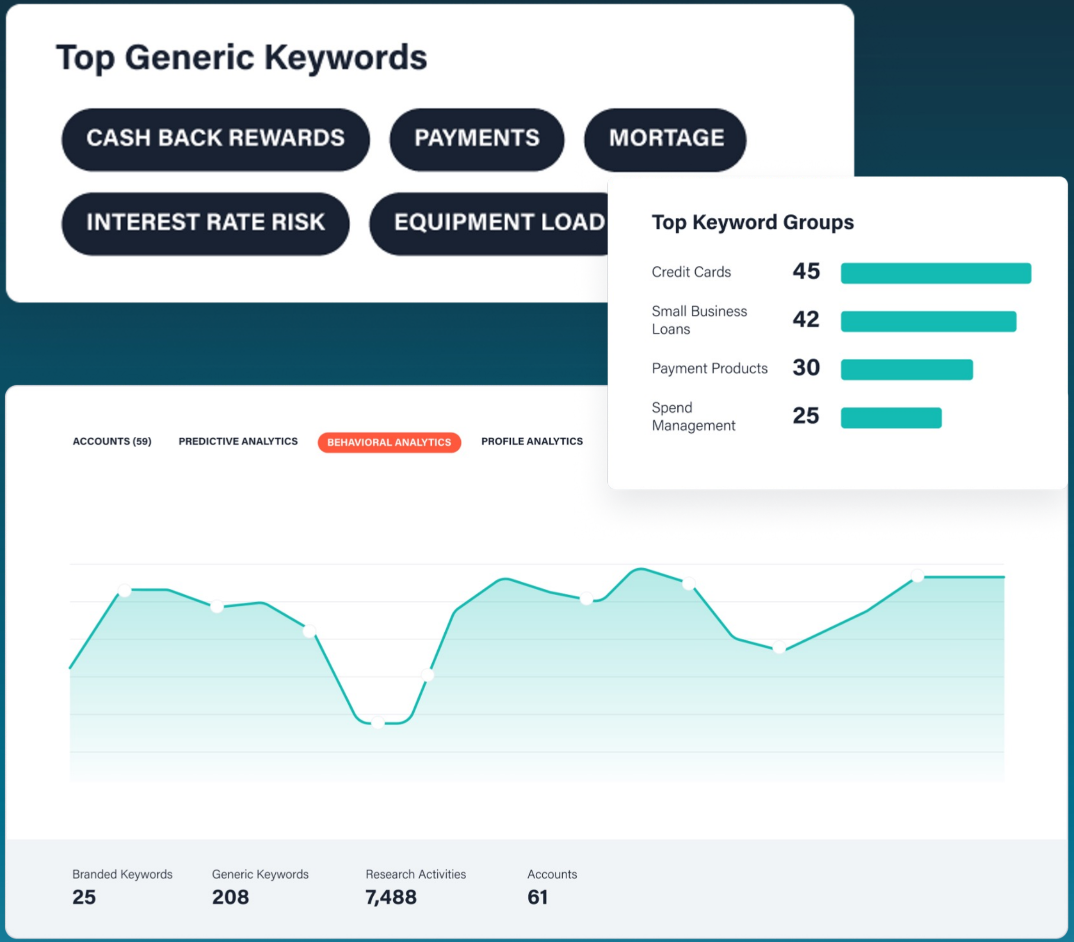
EXAMPLE

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.



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.

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

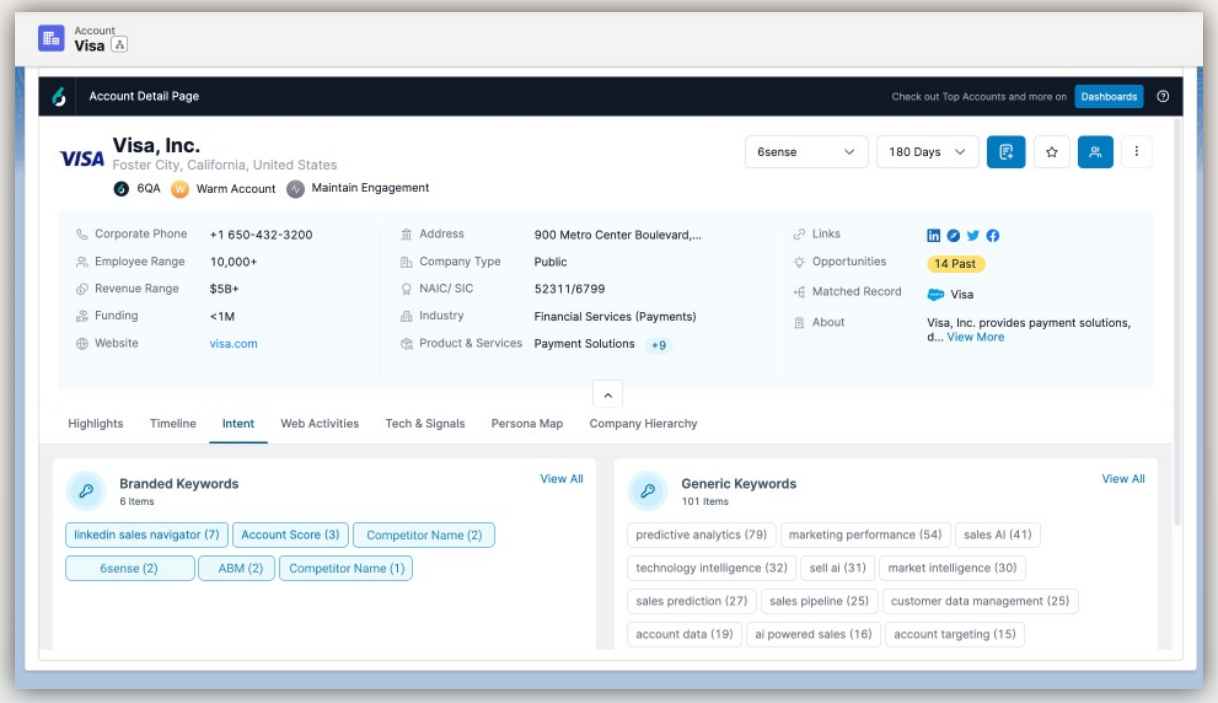
EXAMPLE

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.



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.

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

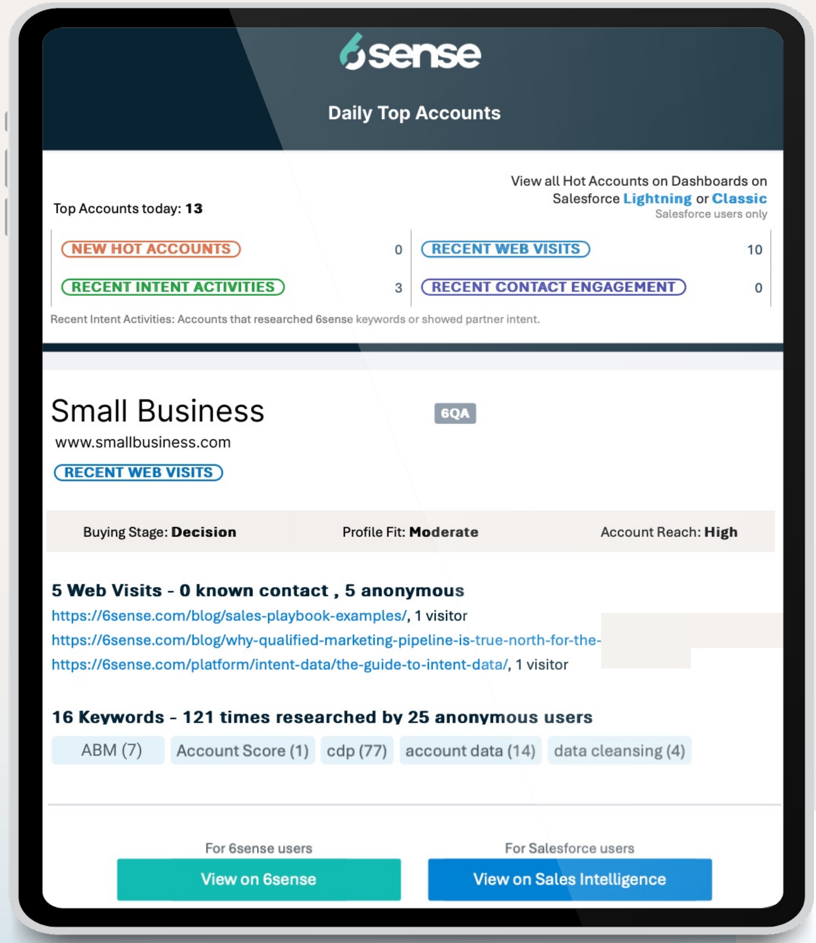
EXAMPLE

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.



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

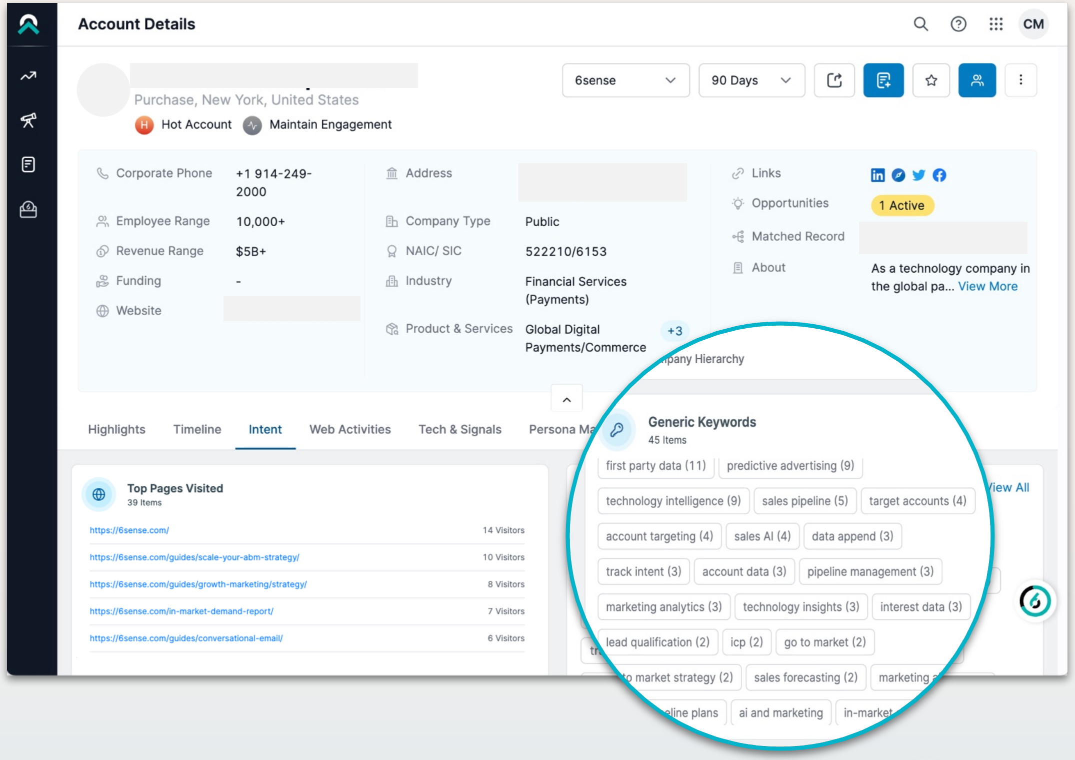
EXAMPLE

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.



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.

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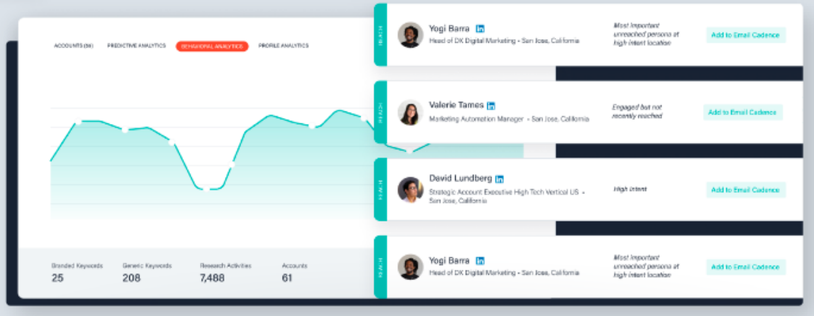
ACTIVATION LAYER

Revenue AI™ for Marketing



Revenue AI™ for Sales

INTELLIGENCE LAYER

WHO
Anonymous Buyer Intelligence

WHEN
Predictive Intelligence

HOW
Recommendation Intelligence

WHAT
Generative Intelligence

Data Cleansing & Connecting

DATA LAYER

Web Activity

Company

Intent

People

Pre-Intent

CRM

MAP

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+13%
More Wins

+45%
Larger Deals

-38%
Shorter Cycles

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