



YOUR BANKING & FINANCIAL SERVICES RETARGETING CHEAT SHEET

If you're new to the world of retargeting, or just looking for a refresher, we've got you covered. Check out these helpful hints on how to target and reach your customers, and get them back to convert.

Before you get started, be sure to complete the following.

① IDENTIFY YOUR BUYING CYCLE

Your buying cycle determines the turnaround on a potential customer's decision to choose your services. Knowing when users are most likely to convert will affect when your ads will be most successful.

② ENSURE YOU HAVE AN OFFERING FEED

Some advertising platforms use your site's feed to insert offers directly into your retargeting ads. However with SteelHouse, no feed is necessary – the SteelHouse pixel dynamically and seamlessly pulls offers into your ads automatically, saving what can be a time-consuming process.

③ CREATE SEGMENTS BASED ON YOUR CUSTOMER'S JOURNEY

Poor retargeting performance can often be attributed to "one size fits all" campaigns, with broad messaging served to all site visitors. Drive more conversions by pairing messaging and offers with customers based on where they are in the buying journey.

CONSIDERATION CAMPAIGNS

Whether they're just thinking about signing up for financial products or services, researching your brand's offering, or spending a lot of time on your site without taking action, these users aren't quite ready to convert. It's time to pique their interest.

JUST IN MARKET

 1-3 Page Views

 1 Site Visit

WHO THEY ARE

People who browsed your site but are still learning about your brand and your offerings.

HOW TO ENGAGE THEM

Use the specific pages they engaged with to determine your message. For example: if they clicked on your Home Mortgage page, show an offer for a free personalized rate quote.

RELUCTANT SHOPPERS

 4+ Page Views

 1 Site Visit

WHO THEY ARE

People who visited your site just once but clicked around more than the average first-time visitor.

HOW TO ENGAGE THEM

Present them with a modest offer; it may be enough to push these customers over the edge.

CREATIVE TIPS



A with a new checking and savings account with qualifying activities.

B BANK FINANCIAL [Explore Now](#)

A **STATE YOUR PROMO**
Ensure your selling point is clear; if you are offering a reward for opening a new checking account, make sure that message is prominent in your ad.

B **SHOW YOUR LOGO**
Ads with prominent logos perform 12% better than those with small or those that blend into the background.

CONVERSION CAMPAIGNS

It's time to get aggressive with your offers and bids. Users close to converting are making final decisions on what brand to choose, so it's important you have the extra edge. Pull out all the stops to ensure that when they decide who to go with, it's with you.



CREATIVE TIPS

HIGHLY-ENGAGED

2+ Views to Specific Product Page

WHO THEY ARE

People who have shown enough interest in a specific product or service to view its page multiple times.

HOW TO ENGAGE THEM

Employ retargeting ads that feature an offer they have repeatedly viewed to keep a potential service top-of-mind.

LINGERING PROSPECTS

2+ Page Views

WHO THEY ARE

These people know your brand, and care enough to come back to your site, but aren't converting.

HOW TO ENGAGE THEM

Your brand is appealing to them, but they're not pulling the trigger. Give them an aggressive offer to convince them to convert.

CONTACT FORM & FORM ABANDONERS

1+ Form Abandoned

WHO THEY ARE

People who have started filling out a form or requested contact information on your website but never converted.

HOW TO ENGAGE THEM

Serve them ads that feature the service or offering they indicated interest in, paired with an aggressive offer if applicable, to nudge them into completing the sign up process.

An advertisement for Bank Financial. It features a woman in a pink jacket looking at a screen. The text reads: "NEW CUSTOMERS GET UP TO \$250 with a new checking and savings account with qualifying activities." At the bottom, there is the Bank Financial logo and an "Explore Now" button with a blue circle containing the letter 'B'. A blue circle containing the letter 'A' is also present on the left side of the ad.

A DO THE MATH
If you're offering a discount on a specific service, show both the percentage and the actual dollar amount saved.

B CALL FOR ACTION
Your CTA wording should apply to your offer; consider using wording like "Explore Now" and "Save Today."



LOYALTY CAMPAIGNS

Users that have previously converted, or re-entered sales cycles, come in all shapes and sizes. Some may be loyal and love your brand, while others may have forgotten about you. Diversify your message based on who you're targeting, and why you're targeting them.

BRAND LOYALISTS

✓ 2+ Commitments

WHO THEY ARE

These people love you enough that they purchased from you multiple times.

HOW TO ENGAGE THEM

Create a segment of repeat customers by service category. Customers often fall in love with brands because of specific services – if they like your rewards program, show them other opportunities to earn points.

UN-ENGAGED CUSTOMERS

✓ 1 Commitment

WHO THEY ARE

People who have only converted once, but never returned to your site.

HOW TO ENGAGE THEM

Promote services that complement offers they previously converted on, so you can give them a reason to return.

CREATIVE TIPS



NEW CUSTOMERS
GET
UP TO
\$250
with a new checking and savings account with qualifying activities.

 **BANK FINANCIAL**

[Explore Now](#)

A

A

PUT IT IN MOTION

Lifestyle videos or animations showing how their lives can be improved by using your services perform better than just images alone.