

## INCREASING CUSTOMER ENGAGEMENT AND CREATING UNIQUE EXPERIENCES THROUGH PERSONALIZATION WITH SITECORE EXPERIENCE PLATFORM

Consumer behavior and technology disruptions today are forcing Financial Services organizations to undergo unprecedented digital change. It is no surprise that the majority of organizations are prioritizing a formal customer experience strategy to develop that seamless digital journey.

Our client, a well established online bank, believes that **personalization is the key to creating unique experiences**. To deliver a more personalized and engaging experience to its customers, our client counted with Noesis expertise with Sitecore on the development of a new website that **improves access to information and self-service features**.



Sector:  
**Financial Services**

Business Unit:  
**Enterprise Solutions**

Solution:  
**Sitecore**



**4.7/5**  
App rating



**2020**  
**Sitecore Experience**  
**Award Winner**



## THE CHALLENGE

The previous site lacked mobile optimization, and the marketing team could not manage content without involving the IT department. Users found it complex and challenging to navigate. Therefore, the online bank set out to transform its digital presence with a cloud-based platform that delivered **scalability, security, search engine optimization**, and **improved performance**.

- Upgrading the existing Sitecore platform to **increase functionality, personalization**, and **customer experience**;
- Migrating from the existing Sitecore version to XP 9.1.

## GOALS

By Upgrading the existing website to Sitecore Experience Platform XP 9.1, our team provided the tools to collaboratively launch and evolve unique experiences that successfully drive engagement.

Always aligned with our client's main goals:

- Build a **unique connection** with each customer;
- Use **digital channels** for making contact, understanding, and responding to their feedback;
- Present a **more human and emotional face** to personal finances;
- **Improve** internal operations and content management.

# SOLUTION

**Sitecore Experience Platform (XP 9.1)** provides marketers with comprehensive digital marketing tools – combining customer data, analytics, machine-learning generated insights, and marketing automation — **fostering powerful personalized experiences across any channel, in real-time.**

The features of Sitecore XP empower brands to connect all their data to create, tailor, and personalize each customer experience:

- **Sitecore Experience Accelerator (SXA):** reusable templates that accelerate page builds, allow customers to edit content, and control layout and functionality;
- **Path Analyzer:** review how site visitors move through your website and digital ecosystem, what pages are aiding conversions, and where visitors encounter friction in their journey;
- **Marketing Automation:** execute campaigns with automated content, and streamline content, interactions, and responses across all channels to nurture better relationships with your clients;
- **Analytics Tools:** collect and connect real-time customer data and interactions from omnichannel engagement, campaigns, and third-party systems for actionable insights;
- **Integrations** with OutSystems and xConnect.



## THE RESULT

Our client now offers a new, more personalized web experience, improving access to information and self-service features for customers:

- **Increased customer engagement** with visitors spending more time on the website;
- Achieved a **4.7/5** rating for the company's app;
- **Improved customer access to information** and transaction management;
- Developed a **single content creation point** for the web and mobile apps;
- Freed staff to create, edit, publish **content without IT support or writing code** and **reduced time-to-market** for new content;
- **Simplified** customer onboarding and gathered and mapped site use to **better understand customer engagement and journeys.**



Noesis is an international tech consulting company offering services and solutions to support clients in their business and digital transformation. Noesis solutions focus on infrastructures, software, quality, and people. The organization is based on highly specialized talents, operating in nine business units and six countries: Portugal, Spain, the Netherlands, Brazil, Ireland, and The USA. Since 2020, Noesis has joined Altia, listed on The Alternative Equity Market, an organization with over 2000 employees, 3 Datacenters, and 20 offices.



Noesis is Gold partner of Sitecore, a global leader in the development of experience management applications that empower contextual marketing. The Sitecore® Experience Platform™ enables you to manage content, provide contextual intelligence, automate communications, and accelerate custom commerce on a large scale.