



Omnichannel Campaigns: A Winning Strategy for Financial Services



The New Reality

Customers expect personalized financial guidance, not generic promotions.

74%

now expect tailored experiences.

The Challenge for Financial Institutions

Financial institutions struggle to meet modern customer expectations due to:

- Disconnected communication across channels
- Underused customer data
- Generic messaging that reduces engagement



Where 8x8's Omnichannel Messaging Makes the Difference



Unified Platform

Unifies channels so SMS, RCS, voice, and messaging apps feel consistent.



Smart Timing

Use real-time triggers to deliver the right message at the right moment.



Human-Feel Automation

Scale communication that still feels personal.



Meaningful cross-channel engagement can drive revenue up to

20%.

Messaging Tools Power Personalization



- Automatic messages triggered by transactions
- Unified customer data in one place
- Real-time insights for better campaigns

Use Cases of Omnichannel Messaging for Financial Institutions



Channel-Matched Urgency

Critical alerts via voice calls, updates through SMS, detailed inquiries and documents via messaging apps.

Always-On Support

Automated chatbots and instant messaging provide instant answers to common questions, with handoff to live agents when needed.

Seamless Support

Agents can access full interaction history across channels to provide personalized support without customers repeating themselves.

Build Trust Through Meaningful Connections

In financial services, trust is everything.

Personalized omnichannel communication strengthens it at every step, transforming disconnected touchpoints into a seamless journey that customers can rely on.



[Click here to read full blog](#)

For more information, contact us at hello-cpaas@8x8.com or visit cpaas.8x8.com