

INSPIRED DIGITAL EXPERIENCES

Turn Transactions Into Transformative Experiences

PERFICIENT®

Adobe



Financial services power economies, fuel ambitions, and safeguard futures. But today's market demands more: relentless innovation, unwavering security, and consumer-centric strategies. To enable intelligent scalability, firms must deliver seamless, hyper-personalized experiences across the enterprise, accelerate operational agility, and unlock real-time insights.

Perficient helps financial institutions rise to these challenges by driving resilient, compliant, AI-first transformation that enhances efficiency and customer trust through our strategic partnership with Adobe. Together, we deliver advanced digital solutions that enable organizations to forge lasting client and employee relationships, harness AI and analytics for transformative decision making, and pioneer sustainable growth models that align profit with purpose.

The following case studies highlight how we've helped financial services leaders modernize digital ecosystems, streamline operations, and elevate customer engagement. While each client's journey is unique, the goals are shared: innovate boldly, adapt quickly, and lead with experience.

Explore how Perficient and Adobe are shaping the future of financial services one experience at a time.

INCREASING
ENGAGEMENT

FORTUNE 100 FINANCIAL SERVICES PROVIDER

Increasing Engagement With Marketing Automation

PERSONALIZED
EXPERIENCES

CUSTOMER
SELF-SERVICE

CONSISTENT AND
PERSONALIZED CX

EFFECTIVE DATA FOR
EMAIL MARKETING

Challenge + Opportunity

Despite major marketing investments to boost awareness of its retail services, a lack of communication between the financial institution's business lines led to uncoordinated emails, causing confusion and a lack of engagement.

Solution Highlights

Our team implemented Adobe Campaign for cross-channel campaign creation and management. We centralized a rules-based platform for email marketing and automation.

Key Benefits

With marketing automation and cross-channel campaigns, the provider of retirement services and solutions increased awareness of its wealth management services, along with improved customer engagement.



**Agile Project
Management**



**Scalable for
Growth**

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A GLOBAL PROVIDER OF AUTO FINANCE

Creating Personalized Multichannel User Experiences

Challenge + Opportunity

A global provider of auto finance solutions wanted to use Adobe Experience Cloud to create seamless multichannel personalized experiences that build customer loyalty, provide a constant connection, and enable self-service to improve the experience of its users.

Solution Highlights

We led a phased (Crawl, Walk, Run) strategy to execute analytics and personalization to increase engagement and reduce cost. This approach allowed the company to measure and analyze real-time data, and, in turn, personalize and improve users’ digital experiences. Our team continues to assist in operational efficiencies around the globe.

Key Benefits

90%

Increase in NET
Promoter Score

47%

Call Volume Reduction
in Key Areas

121%

Increase in Autopay
Registration

82%

Increase in New
Feature Adoption

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A GLOBAL PROVIDER OF AUTO FINANCE

Creating Reliable Customer Self-Service With Adobe

Challenge + Opportunity

The company wanted to provide a self-service experience across multiple channels to improve customer satisfaction, build loyalty, reduce call center volume, and lower costs.

Solution Highlights

We helped design and build the company's self-service My-account site using Adobe Experience Manager and a mobile application using Microsoft Xamarin and Adobe Analytics.

Key Benefits

The innovative experience increased Net Promotor Scores by 90% and reduced call center volume by 47% in key areas such as billing and statements, make a payment, and forgotten password.

112%

Increase in Digital Auto PAY
Registration



Won 3 Digital
Marketing Awards



Drove \$112K in Loans
and Leases

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FORTUNE 500 FINANCIAL INSTITUTION

Elevating Experiences Across a Growing Enterprise

Challenge + Opportunity

Following an acquisition, the company needed to consolidate and optimize Adobe Experience Platform (AEP) for consistent messaging and personalized customer experiences.

Solution Highlights

We integrated and updated the platforms into a single AEP to support the upgrade to Adobe CJA, Target, and CDP, which provide tools to enhance the customer journey.

Key Benefits

The integrated platforms seamlessly utilize internal segmentation to ensure personalized experiences. The migration to Target is estimated to provide nearly \$800K in savings per year.



**Cohesive Brand
Messaging**



**Increased Wallet
Share**



**Scalable for Future
Business Needs**

INCREASING
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EFFECTIVE DATA FOR
EMAIL MARKETING

LEADING DIGITAL PAYMENTS PROVIDER FOR U.S. GAMING MARKET

Marketo Transforms Data Into Effective Email Marketing

Challenge + Opportunity

The sports betting and casino gaming digital payments provider needed to consolidate its outsourced digital marketing strategy and tool-set into one actionable platform.

Solution Highlights

We implemented and configured Marketo to build complex, custom campaigns. Unique identifiers streamlined how customer data is imported, structured, and used within Marketo.

Key Benefits

A seamless integration between customer data and the marketing strategy enabled dynamic, personalized, and timely customer emails that drove increased revenue.

99.6%

Inbox Deliverability
Rate for IP Warming

42.7%

Email Open rate
for IP Warming



Trained Teams to
Utilize the Platform

Global AI-First Consulting for the World's Most Innovative Brands

We're a global, AI-first, digital consultancy with thousands of skilled strategists and technologists in the U.S., Latin America, India, Europe, and around the world. We're transforming how the world's most admired brands connect with customers and grow their business.



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