



6 tips for smart finserv partnerships

Finserv is regulated and cautious — but partnerships can deliver if you. . .

1 Screen wisely

Choose partners that are finserv-savvy, understand compliance, and run a tight ship

INSIDER TIP:

Find them with Partnership Cloud's Discovery function.

INSIDER TIP:

To maximize ROAS, adjust payout rates according to product, customer status, and FICO score.

2 Tier commissions

Set commissions by customer and product value, not just applications

3 Monitor smartly

Automate compliance monitoring and quality control for every partner, site, and campaign



INSIDER TIP:

The more data you can share with partners, the more effective they can be

4 Test it out

Use partner campaigns to test SEO and retargeting strategies

5 Automate management

Spend less time on tedious, manual messaging and monitoring processes, and more time on innovating



INSIDER TIP:

Partnering expands your customer base to include your partner's as well.

6 Go B2B

Partner with other businesses to drive new customers together

