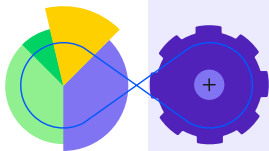


# Future-Proofing BFSI: The Four Digital Experience Imperatives You Need to Tackle in 2025

## INDUSTRY SHEET

Address the four critical challenges that will define the future of digital experiences in BFSI. Overcome these hurdles to deliver experiences, products and services that meet the evolving demands of your prospects and customers.



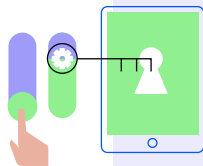
### Tackle Omnichannel Customer Engagement

Customers expect to interact with Financial Services Organizations and brands seamlessly across multiple channels—mobile, web, social media, etc. Managing consistent messaging and experience across these touchpoints, while optimizing performance and engagement is a challenge you need to overcome.



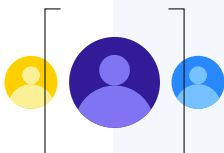
### Overcome Personalization Challenges

Customers in BFSI demand highly personalized experiences. Delivering these at scale could be challenging. Marketers need advanced AI-powered tools to analyze customer data in real-time, create segmented campaigns and offer tailored financial products or services that resonate with individual needs.



### Build Customer Trust in Digital Channels

With the increased omnichannel content consumption and threats associated with using technology, marketers must work harder to maintain customer trust. Financial brands need to communicate their security and compliance measures clearly and consistently, while providing a smooth, secure digital experience across platforms.



### Efficiently Manage Relationships with Intermediaries

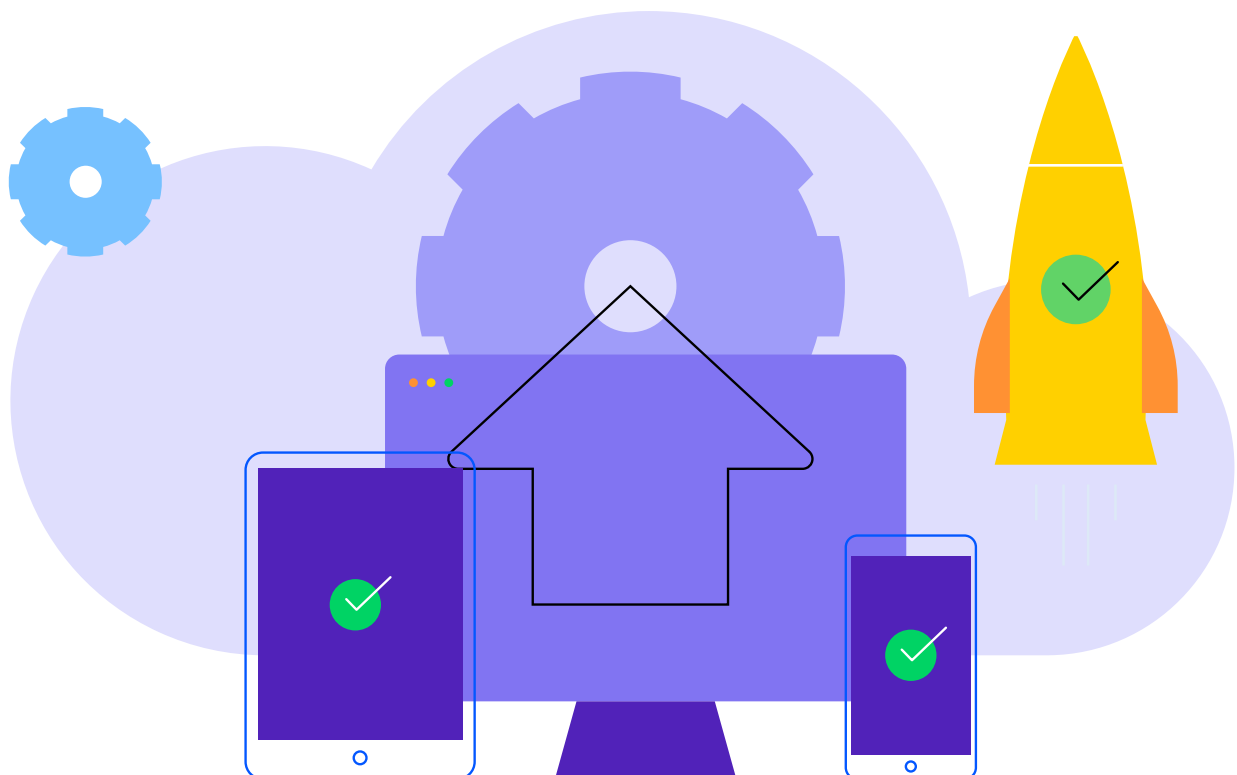
Marketers in BFSI face fragmented Intermediaries communication, lack of personalization, regulatory complexities, limited performance visibility and challenges in scaling relationships.



**“Financial services organizations, particularly in banking and insurance, will need to adopt a more agile and multifaceted approach to their digital strategies to stay competitive. While insurers are still in the process of digital maturation, banking institutions are under pressure to enhance profitability. Both sectors are increasingly turning to AI, automation and customer experience to fuel innovation**

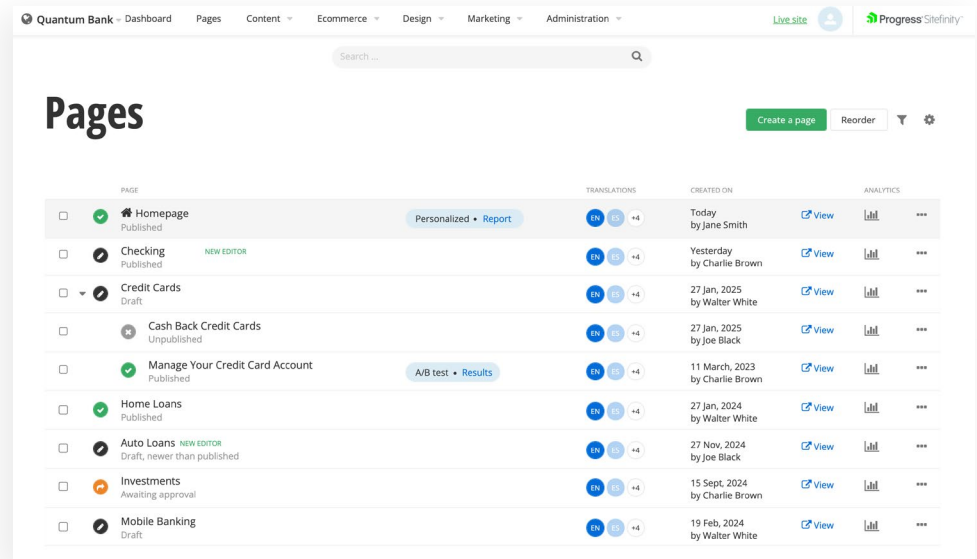
**Success will come from a balanced mix of internal innovation, strategic partnerships and the ability to adapt quickly to changing market conditions. The focus will shift from simply creating enjoyable experiences to fostering innovation that drives profitability and business value.”**

**Gartner** <https://www.gartner.com/en/webinar/555899/1258558>



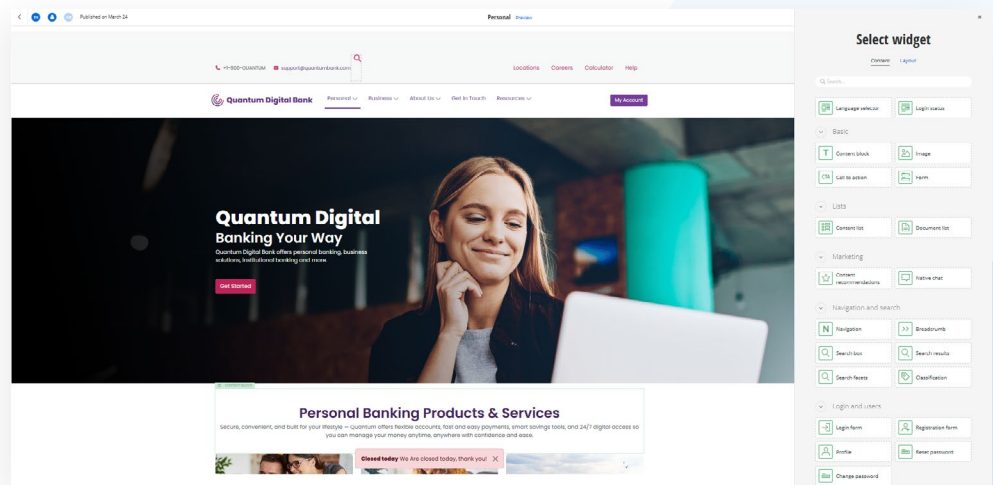
# BFSI Digital Experiences Built Around Your Customers and Partners

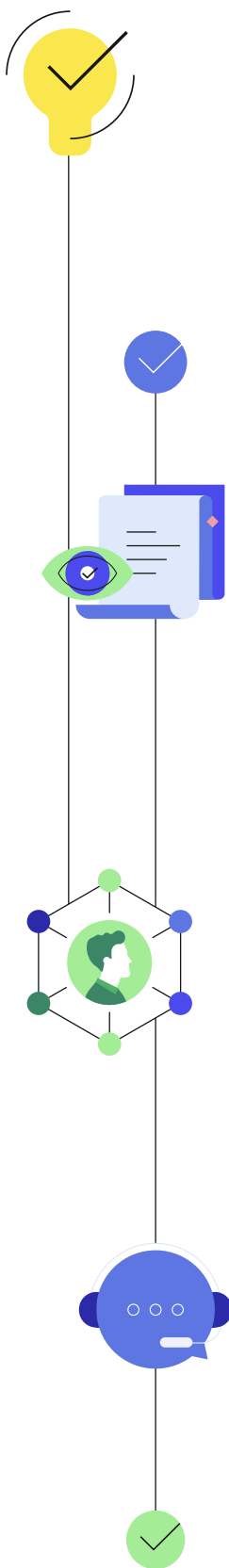
Your organization requires intuitive and flexible tools for creating, managing and delivering tailored messaging and personalized experiences to meet your customers' evolving needs.



## ➤ Ease of Use for Content and Product Managers

Progress Sitefinity empowers banking professionals, mortgage specialists, financial advisors and marketing teams with a user-friendly interface that simplifies content management and communication. Whether you're updating mortgage rates, posting new banking offers or creating customer-facing materials, the intuitive drag-and-drop functionality and streamlined workflows of Sitefinity CMS make the process straightforward. Team members can easily add and update content, so that the latest financial products, services and rates are always up to date. This ease of use eliminates bottlenecks and improves efficiency, allowing your team to focus more on delivering valuable services to customers and improving their overall experience with BFSI organizations.

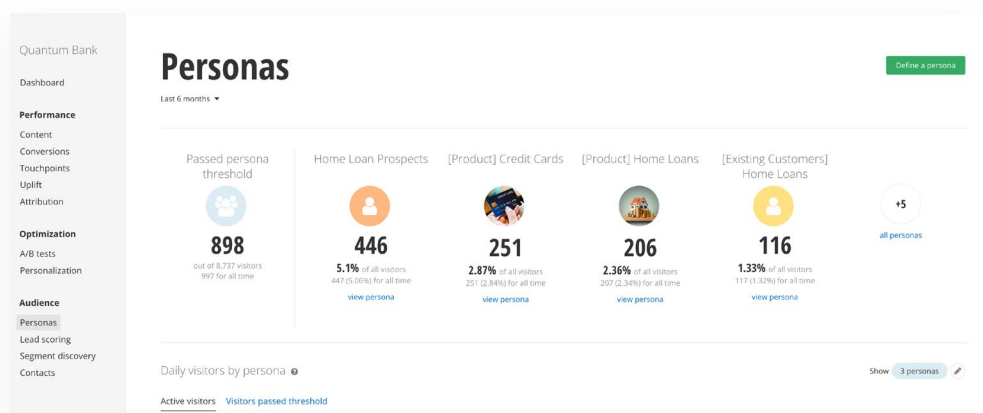




## ➤ Dynamic Personalization and AI-Driven Content Recommendation

Sitefinity CMS allows marketers to create dynamic, personalized content experiences based on user behaviors, content consumption, traffic and campaign sources, customer profiles and past interactions. Personalize content for specific audience segments, such as different banking or insurance customers, using data-driven insights from your CRM, marketing automation or other data sources. Automate content recommendations based on user engagement patterns leveraging the AI-driven content recommendation engine in Progress Sitefinity Insight.

With built-in Headless/multichannel support, banking, financial services and insurance brokers using the Sitefinity platform can easily manage consistent content delivery across multiple channels—websites, mobile apps and social media—through a single platform, delivering cohesive communication across customer touchpoints.



## ➤ GDPR and Privacy Regulation Tools

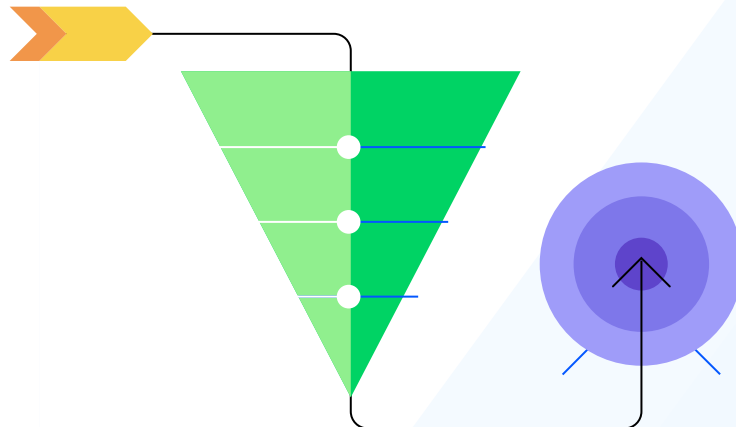
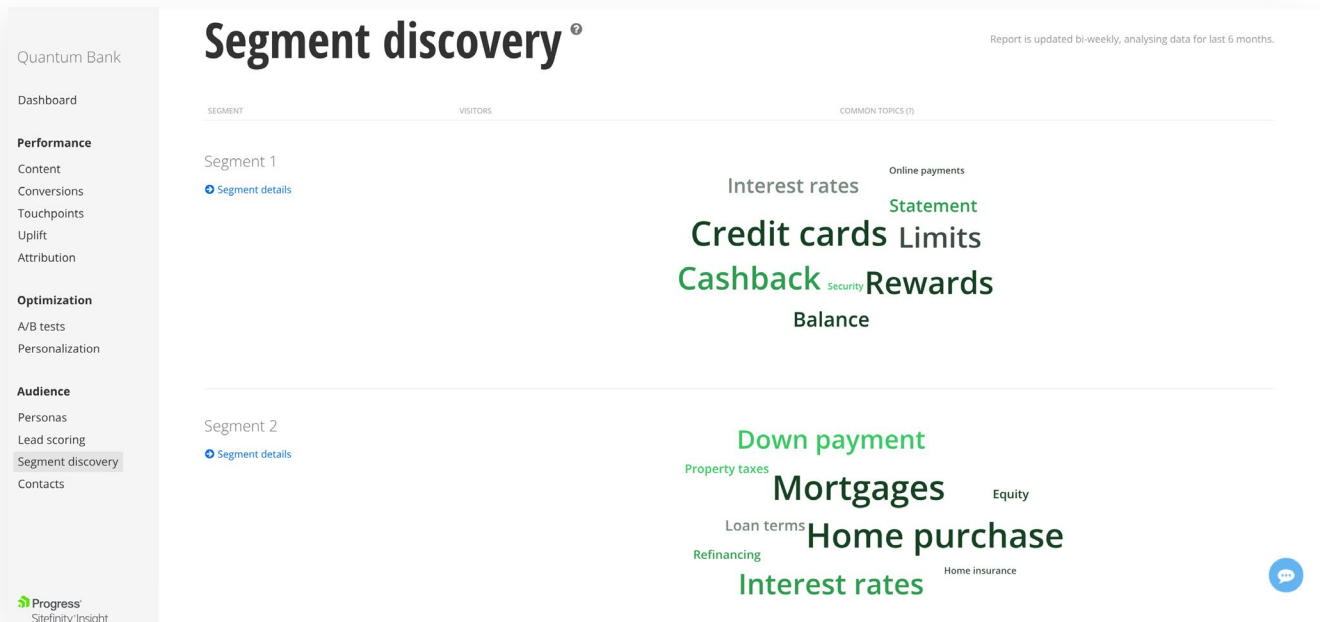
The Sitefinity platform has built-in tools to help BFSI comply with data protection regulations. Features such as PII obfuscation, workflows and advanced audit trails, version history and content staging make it easier for Financial Services providers to manage data privacy and improve compliance.

## ➤ Self-Service Portals for Intermediaries, Brokers and Business Representatives

The portal and authenticated experiences capabilities in Sitefinity enable BFSI organizations to create partner/intermediary portals to centralize interactions, deliver personalized content, provide real-time insights and automate processes and workflows.

## ➤ Data-Driven Insights and Conversion Rate Optimization Capabilities

The built-in analytics of Sitefinity provide marketing and demand generation teams with actionable insights into prospect and customer interactions and content performance, allowing them to optimize and deliver tailored messaging and offers and fine-tune communication strategies, leading to improving overall engagement.

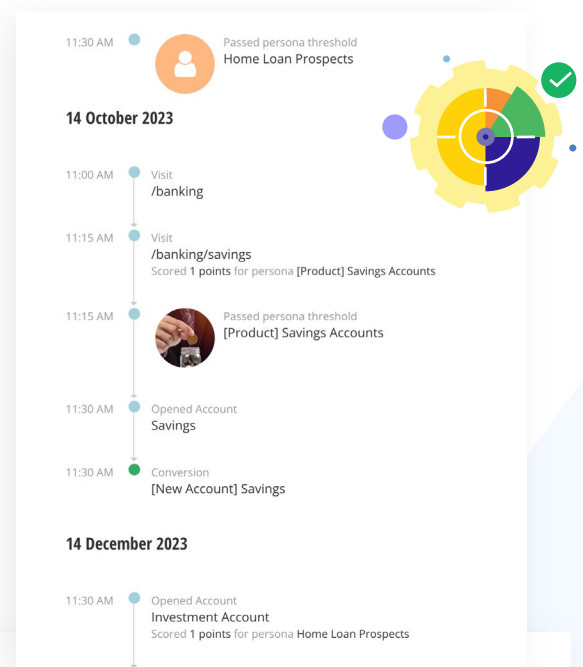


“Bringing everything into a multi-site instance and utilizing the Sitefinity SiteSync capabilities has saved a lot of time and resources. Everything is in one place now and a full audit trail is available.”

**Kristina Angelova**  
Partner & Digital Strategy  
Consultant at Rika Digital

## Streamline IT and Marketing Collaboration for Timely, Relevant Customer and Intermediary Engagement

Get instant access to the critical features required to launch and maintain initiatives that enhance your operational efficiency and the experience of your prospects and customers.



### Persona details

PERSONA	VISITORS PASSED THRESHOLD IN LAST 6 MONTHS (?)	VISITORS FOR ALL TIME	LAST VISITOR PASSED THRESHOLD	CONTACTS FOR LAST 6 MONTHS (?)	CONTACTS FOR ALL TIME
<b>Home Loan Prospects</b> People who have a good chance of signing up for a home loan.	<div><div></div></div> 446 (5.1%)	447 (5.06%)	27 Mar 2025	36	37
<b>[Product] Credit Cards</b> Recently browsing credit cards	<div><div></div></div> 251 (2.87%)	251 (2.84%)	27 Mar 2025	6	6
<b>[Product] Home Loans</b> Recently browsing home loans	<div><div></div></div> 206 (2.36%)	207 (2.34%)	27 Mar 2025	13	14
<b>[Existing Customers] Home Loans</b> Have a current home loan product with MyBank	<div><div></div></div> 116 (1.33%)	117 (1.32%)	27 Mar 2025	21	22
<b>Existing Customer</b> Customer of My Bank	<div><div></div></div> 49 (0.56%)	50 (0.57%)	27 Mar 2025	9	10
<b>[Product] Savings Accounts</b> Recently browsing savings accounts	<div><div></div></div> 36 (0.41%)	135 (1.53%)	27 Mar 2025	6	105

For Developers	For Practitioners
React/Next.JS support or ASP.NET Core	Easily create custom content types to match product requirements
Powerful headless APIs	Visual drag-and-drop page-building
Content module/form builder	Accessibility and compliance tools
Low-code, event-driven integrations	Workflows, automation and content synchronization
Built-in DevOps and CI/CD	Digital asset management, search, CRM and MarTech integrations
Cloud deployment	Content revision history
AI-powered widget development	Built-in tools for search engine optimization
	GenAI support

# Kensington Mortgages Transforms its Digital Properties and Streamlines Operations with Progress Sitefinity



[View Case Study](#)



# Let Sitefinity Cloud Handle the Complexity for You

Sitefinity Cloud is a fully managed digital experience platform that streamlines and accelerates web operations. Launch quickly, stay current with the latest features and scale as your needs evolve—without the resource and infrastructure overhead of in-house deployment.

<b>Sitefinity Cloud Base</b>  Sitefinity Cloud Base provides the essentials for any cloud implementation. It allows you to create experiences on a cloud-managed infrastructure, with the flexibility to start small and scale parameters such as page views or users as your needs grow.	Global Azure Cloud Infrastructure	Access to the Latest Sitefinity CMS Features
	Triple Zone Redundancy	5 Supported Languages
	99.95% Uptime Service Level Availability (SLA)	Built-in Hosting for ASP.NET Core or Next.js Front Ends
	1 Million Included Pageviews	10 Backend Users
	5 Million Included API Calls	10 Service Management Users
	Customer Data Platform	Online and Phone Support
	1TB Media Blob Storage	

## Customizable Add-Ons

<b>Scalability Add-ons</b>  These add-ons help your business grow by increasing capacity and performance, allowing your digital presence to scale effectively.	Additional Pageviews	Additional Load-Balanced Environments
	Additional API Calls	Additional Backend Users
	Developer Extensions	Additional Supported Languages
	Dedicated Setup	24/7 Support
<b>Feature Add-ons</b>  These add-ons streamline workflows, simplify content management, accelerate creation and safeguard digital assets.	MarTech and Business Tools Connectors	Advanced Security & Compliance
	Ecommerce Integration	Azure AI Search
	Open AI Integration	
<b>Sitefinity Enterprise Package</b>  Enhance efficiency, simplify complex workflows and support global scalability with advanced personalization, robust integration capabilities and enterprise-grade governance.	Personalization	Integration Hub
	A/B Testing	Unlimited Backend Users
	Translation Management	Unlimited Languages
	Audit Trail	User Groups Per Site

[Learn More](#)



# Four Years in a Row: Progress Recognized in the Gartner® Magic Quadrant™ for DXP

Progress was one of 17 vendors evaluated in the report and was recognized based on its Completeness of Vision and Ability to Execute.

[Download Report](#)

Figure 1: Magic Quadrant for Digital Experience Platforms



Gartner

Gartner, Magic Quadrant for Digital Experience Platforms; Irina Guseva, Mike Lowndes, Jim Murphy, John Field; January 27, 2025.

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