

# turning tools into trust: helping accountholders use tools that matter

You offer helpful tools and services to support your accountholders – but too often, they’re just not using them.

Sometimes, your accountholders simply aren’t aware of what’s available. Other times, it feels too complicated, or they assume those services aren’t meant for them. Whatever the reason, it’s a missed opportunity – for them and for you.

That’s why your marketing matters.

## turn access into action

Promoting your products isn’t about selling something new.

Instead, your marketing efforts should focus on driving awareness, understanding, and engagement. Your strategy is what will bridge the critical gap between access and engagement – empowering both new and existing accountholders to truly benefit from the products, services, and tools already at their fingertips – guiding accountholders toward meaningful outcomes.

By educating your accountholders on the value and real-world applications of the resources you offer, you can deepen relationships, build trust, increase satisfaction, and drive retention all while turning passive users into empowered and engaged advocates.



# from provider to partner: the art of understanding

Today's consumers and small business owners aren't just looking for a safe place to store their money or a provider who processes deposits and payments.

They're looking for a *partner* who listens, supports, and empowers them with confidence and a pathway to financial health. A partner who sees beyond the numbers, truly understands them, and recognizes the full picture.

Because behind every transaction is a story: a savings goal, an unexpected expense, a business ready to grow, or a dream waiting to be realized.

It's not just about money – it's about the meaning behind the money. These moments may show up as simple numbers to you, but to your accountholders, they represent something deeply personal and often emotional.

## financial confidence: the cornerstone of strong banking relationships

Life events, both positive and negative, serve as turning points for financial behaviors.

In fact, 75% of accountholders surveyed in the Jack Henry Financial Sentiment Study experienced events that disrupted their financial confidence, such as job loss, medical emergencies, or family milestones.<sup>1</sup> With support from financial institutions varying depending on the event, marriage and promotions saw satisfaction rates of 70%, while job loss and medical emergencies plummeted to 25% and 35%, respectively.

These findings suggest that while financial institutions perform well in predictable, positive moments, they often fall short in addressing crises.



Today's consumers and small business owners are looking for a partner who sees beyond the numbers, truly understands them, and recognizes the full picture.

By recognizing the real-life challenges and aspirations your accountholders face, you can transform from just a provider to a trusted partner – going well beyond product offerings and delivering something far more impactful: **confidence**.

When you understand the human side of financial decisions and make sure people are using the tools they need to improve their financial health, you can strengthen relationships and inspire long-term loyalty.

## relevance: the bridge between engagement and loyalty

Many consumers want to make smarter financial decisions, but don't always know where to start.

Your marketing efforts make an impact when solutions are not only easy to use, but clearly explained, visually supported, and made relevant through strategic messaging.

Each touchpoint becomes an opportunity to meet your accountholders where they're at – with the right message, at the right time, and in the context of their real-life needs.

Whether it's a nudge to set up card controls, a tip about budgeting tools, or a reminder about savings features, you're demonstrating that you're invested in their success and ready to help in their moments of need.

When accountholders receive timely, helpful guidance – especially in moments of financial stress or decision-making – they begin to view you as a dependable partner, not just their financial service provider.

This kind of timely, relevant support builds emotional connection, which leads to stronger loyalty, deeper trust, higher satisfaction, and long-term retention.



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# the Jack Henry™ marketing center: dynamic marketing strategies built for you

The Jack Henry Marketing Center is your ally in building stronger, smarter marketing strategies that drive real results.

Designed with you in mind and built to increase product usage, deepen relationships, and boost engagement, this free platform empowers you to meet your accountholders where they're at with campaigns that are timely, relevant, and easy to launch.

Let's explore three key strategies to help you maximize the Marketing Center's full potential and turn your marketing efforts into meaningful adoption:

## 1. Launch timely, insight-driven campaigns:

Leverage the Marketing Center's pre-built, research-backed campaigns to reach accountholders with messaging that resonates. These strategic campaigns are crafted with deep consumer insights, helping you connect at the right moment with relevant, engaging content that drives action – without having to start from scratch.

## 2. Customize for consistency and connection:

Strengthen your brand presence and relevance by customizing multichannel marketing assets, including emails, social media, print, digital, and more. Tailoring content to reflect your brand and voice makes every interaction more authentic and increases the likelihood that your accountholders will engage and adopt the services you promote.

## 3. Use multichannel distribution to maximize reach:

Choose how to deploy your campaigns. With the option to send via scheduled deployment managed by Jack Henry or self-service downloads for use across your own channels, you can reach your accountholders through the mediums they use the most – boosting visibility and driving adoption across demographics.



When accountholders feel seen, supported, and understood, they don't just engage – they stay loyal.

When accountholders feel seen, supported, and understood, they don't just engage – they stay loyal. The Jack Henry Marketing Center helps you turn moments into momentum and marketing into meaningful relationships.

## make the most of your solutions

Visit the [Jack Henry Marketing Center](#) to find free marketing materials to increase adoption.

Learn more about the way your accountholders feel about their finances in the [Jack Henry Financial Sentiment Study](#).

For more information about Jack Henry, visit [jackhenry.com](https://jackhenry.com).

### **sources**

1. [Jack Henry Financial Sentiment Study](#), Jack Henry, accessed February 25, 2025.