



Financial Services

Guide

The opportunity on TikTok to **gather leads** for Financial Services



Sign up for credit card,
bank account, insurance
offerings



Generate quotes, register
for loan applications



Newsletter opt-in
to stay in touch



Host contest low up on
campaigns



Leads for wealth
management services



Build list for
loyalty programs

The appetite for **more financial content** is **growing** across the category

#investing (2.2M posts)

#savingmoney (317.4k posts)

#buildyourcreditscore (108.3k posts)

#Fintok (102.4k posts)

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But how do banks be **intentional** and establish **real connections**?

Becoming intentional

Nurture consumers to take positive actions to enhance sentiment and supercharge their path to self-education and financial ownership.

Humanising Finance

TikTok is evolving into a guiding source for individuals seeking to discover, learn and make assured financial decisions.

Our platform is driving actionable entertainment, enabling brands to help consumers navigate their financial journeys.

Role for Banks

Foster real connections built upon trust, reliability and relatability.

Banks can humanise finance to deliver lasting, meaningful support to the community.

Creators are the secret source helping brands through authenticity, accessibility and trust.

Popular FinServ Narratives



Voice of a real user

Users tell the story of how a product or service has helped them succeed or improve their life

Voice of staff / founder

Introduce the product or service from the official brand or founder's perspective.

Showcase the App or webpage

Show the interface of an app or website to deliver product information or a walk-through of how to use it

Step-by-step guide

Provide detailed explanations of how to apply or use the product



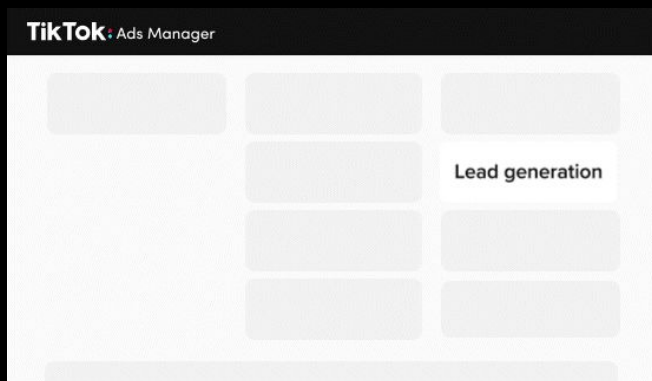
Tips and hacks

Share valuable information that can benefit audiences, such as tips or industry secrets

Skits

Act out a usage scenario and introduce the service information in a short and engaging skit

Turn tuned-in **audiences** into high-value **customers** with TikTok Lead Generation



Learn more about Website Lead Generation [here](#)

Learn more about Native Lead Generation [here](#)



Website Lead Generation

Redirect users to an external landing page and capture leads on your website.

Best for: Boosting traffic on your site, qualifying leads via your site, more detailed qualifying info / questions (i.e. age, credit score).



Native Lead Generation

Capture leads on an (in-app) Instant Form within TikTok, and sync leads to your CRM in real-time*.

Best for: Decreasing user form friction, building customer/email lists, instant lead capture, real-time CRM sync, surveys with <10 questions.

Lead Management

TikTok offers four options to manage your leads when using a Native Lead Generation strategy.



01

CSV Download

Access all your leads data in versatile, downloadable spreadsheets

02

TikTok Leads Center

Easily manage and organize your leads in TikTok's Leads Center platform

03

Partner CRM Integration

Integrate with key CRM partners, like Zapier and Leadsbridge to instantly and seamlessly connect new leads with your salesforce

04

Custom API Integration

For more advanced businesses, use our custom API integration with Webhooks

Acquiring customers through lead generation is a full-funnel approach

01

Brand Awareness

Reach users on TikTok and add educate them on your business solution.

02

Prospecting

Qualify if your leads are potential customers.

03

Nurturing

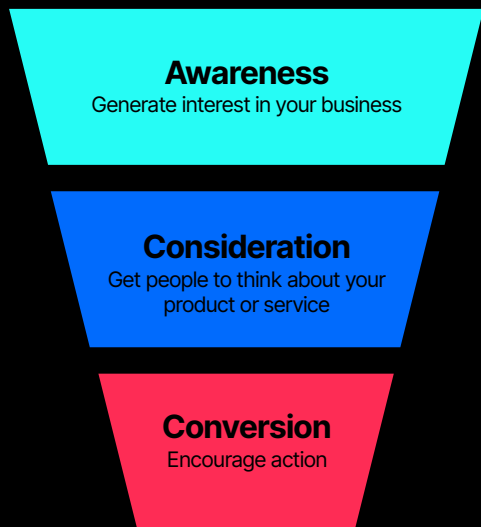
Once you've qualified your leads, bring them down the funnel through relationship building.

04

Optimize

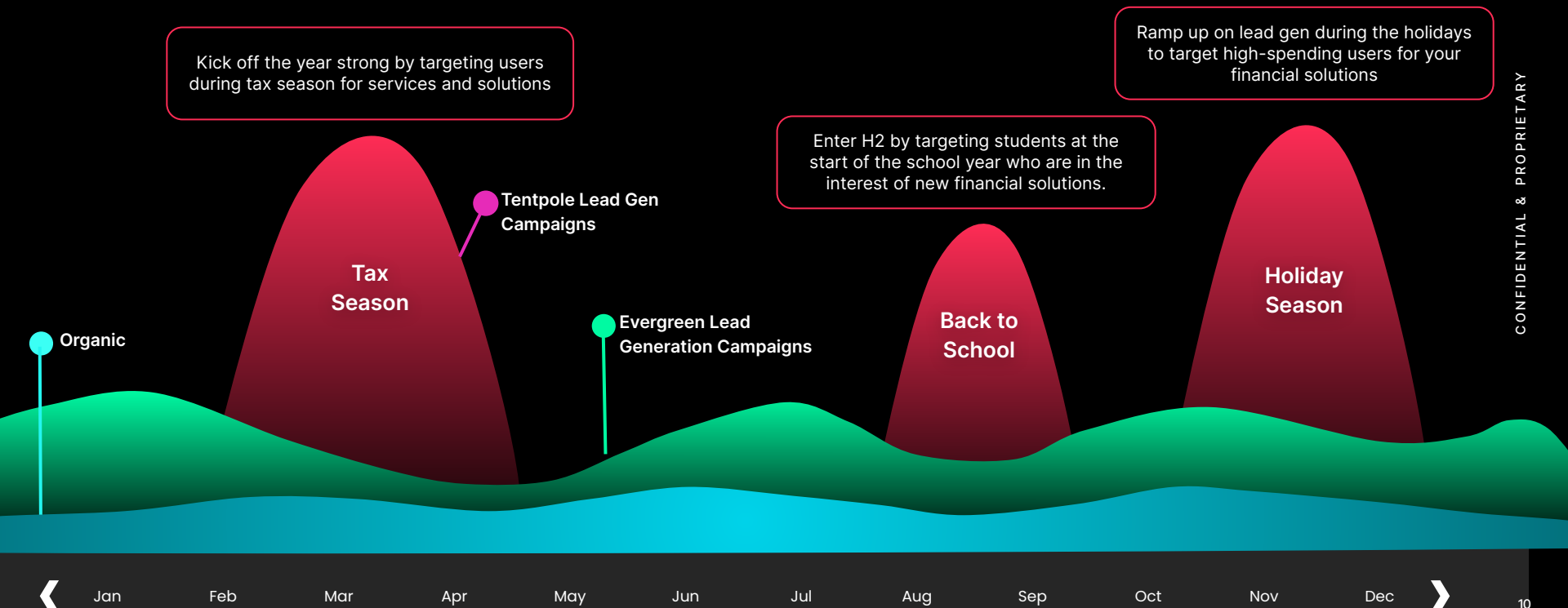
Convert your leads with the intended action and optimize your campaigns based off your previous learnings.

How to prepare for a full-funnel approach



TikTok Event*	Website Action	Advertising solutions
View Content	When a visitor views a specific page such as a Vehicle Detail Page, inventory page, or offer page.	Focused View Evolution of the video view objective which allows you to drive brand impact by optimizing for both video views and interactions.
Submit Form	When a visitor uses the contact feature to call or text with inquiries. When a visitor fills an order form or inquiry form.	Lead Generation Website Lead Generation Native Lead Generation
Complete Registration	When a visitor signs up for something, such as an account registration.	

An **always-on** strategy **supercharges** your impact



THANK YOU

THANK YOU

THANK YOU

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THANK YOU

Reach out to your TikTok Sales Rep to supercharge your advertising strategy today.

Not advertising with us yet? [Sign up](#) to TikTok Ad Manager today.

THANK YOU

