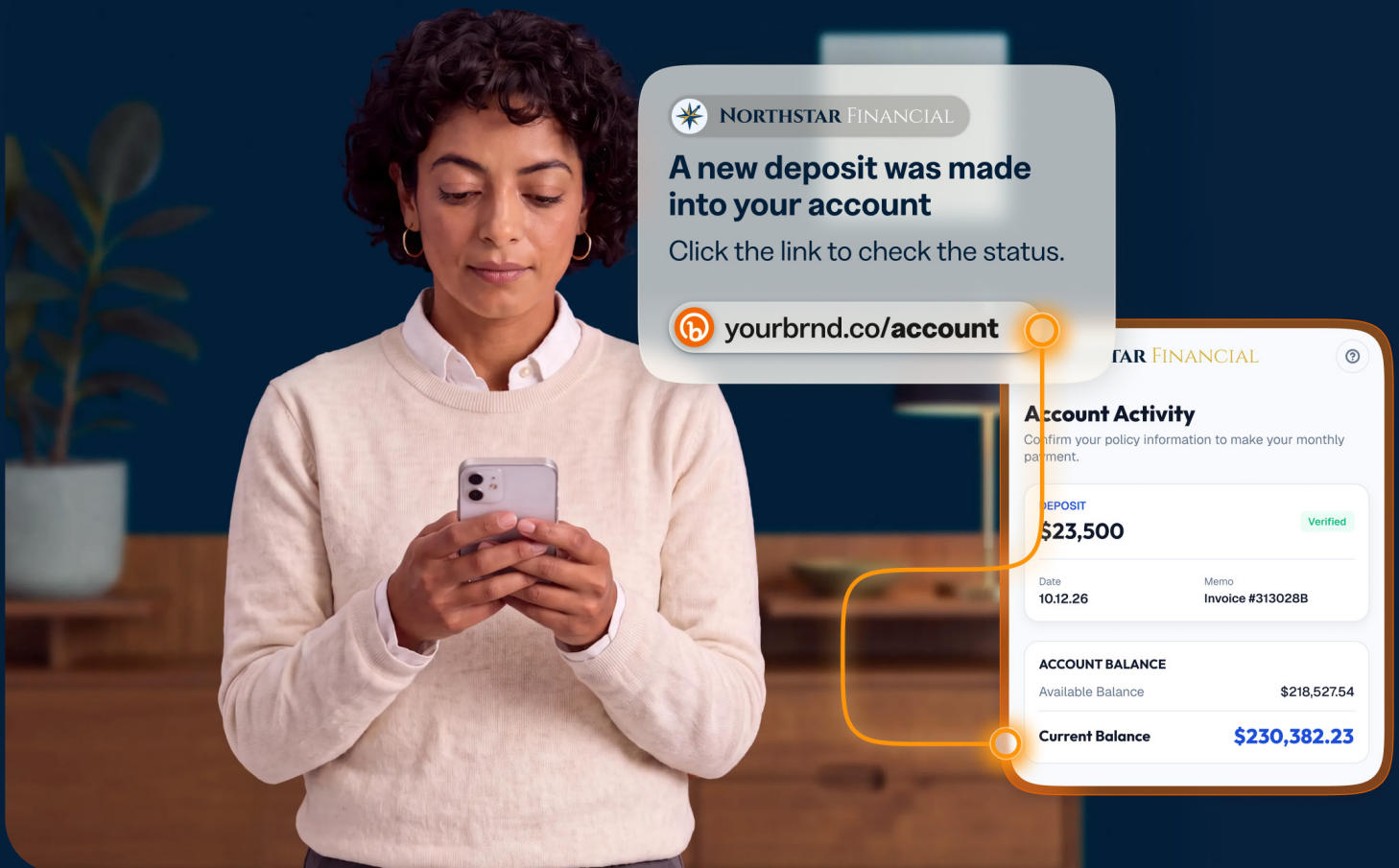




The Financial Services Guide to Building Customer Trust



NORTHSTAR FINANCIAL

A new deposit was made into your account

Click the link to check the status.



yourbrnd.co/account

NORTHSTAR FINANCIAL



Account Activity

Confirm your policy information to make your monthly payment.

DEPOSIT

\$23,500

Verified

Date
10.12.26

Memo
Invoice #313028B

ACCOUNT BALANCE

Available Balance

\$218,527.54

Current Balance

\$230,382.23

How Financial Services Teams Can Build More Trusted Customer Journeys

For customers, money management is personal. Whether they're opening a new account, applying for a loan, checking a payment status, downloading an app, or reviewing an investment update, they expect every interaction to feel simple, secure, and easy to understand.

For financial services and fintech teams, that can be a tall order. Customer communications need to land at the right moment. Lifecycle campaigns need to feel personalized. Product experiences need to reduce friction. And every touchpoint needs to earn a little more trust.

That's why financial services and fintech companies use Bitly to create clearer, more consistent, and more measurable customer experiences. With short links, QR Codes, landing pages, and analytics, Bitly helps teams guide customers to the right destination across SMS, email, in-app messages, print materials, branch signage, direct mail, and more.

In this ebook, we'll share some of the many ways financial services and fintech teams can use Bitly to:

- Build trust across every customer communication
- Simplify onboarding and product adoption
- Drive app engagement and self-service actions
- Support lifecycle marketing and retention campaigns
- Measure what customers click, scan, and engage with

Plus, we'll help you envision a start-to-finish customer journey and how to use Bitly at every touchpoint. **Let's jump in!**

Table of Contents

- 01** Build trust across every customer communication
- 02** Simplify onboarding and product adoption
- 03** Drive app engagement and self-service actions
- 04** Support smarter lifecycle marketing
- 05** Create centralized destinations for key resources
- 06** See how Bitly works across the customer journey
- 07** Create meaningful and measurable experiences

1

Build trust across every customer communication

When customers receive a message from their bank, credit union, payments provider, insurance company, or fintech app, they make a decision in seconds: Do I trust this?

That decision matters. Financial services customers are often asked to take important actions online, from verifying an account to reviewing a statement to completing an application. If the link looks unfamiliar, too long, or unclear, even a legitimate message can create hesitation.

Bitly helps customer communications teams create branded, recognizable links that make every message feel clearer and more trustworthy.

Make every message easy to recognize

Financial services and fintech brands send a wide range of customer communications, including:

- Account alerts
- Payment reminders
- Application updates
- Fraud or security notifications
- Document requests
- Policy or product updates
- Appointment reminders
- Customer support follow-ups

With Bitly Links, you can replace long, complicated URLs with branded short links that use your custom domain. Instead of sending customers to a generic or confusing-looking link, you can create a clean, recognizable URL that reflects your brand.

For example:

- [yourbank.co/verify](#)
- [yourbrand.co/payment](#)
- [yourapp.co/update](#)
- [yourcu.co/apply](#)

Bitly 101

With Bitly, you can easily find the perfect domain to use for all of your short links. A branded link is a shortened URL that uses a brand name—or a word or phrase closely tied to the brand—to associate the company with the shared information.

Some examples of branded links include:

- Bitly: [bit.ly](#)
- New York Times: [nyti.ms](#)
- Huffington Post: [huffpo.com](#)
- LinkedIn: [lnkd.in](#)

Branded links help build awareness and recognition, are a powerful way to promote specific products or services, and can help improve the customer experience.

With Bitly, you can:

- Replace the “bit.ly” in your links with a custom domain. Search for, select, and set up a complimentary custom domain in minutes.
- Create custom back-halves by inserting your own words at the end of a link and give audiences a preview of what they’re clicking.

Use auto-branding so any link shortened by a third party automatically uses your domain.

A branded short link helps customers understand where they're going before they click. That clarity is especially important in financial services, where every customer interaction should reinforce confidence.

Give customers the right next step

Customer communications are most effective when the next step is obvious. A short, descriptive link can help customers take action faster by giving them a preview of what's on the other side.

Use [Bitly Links](#) to direct customers to:

- Secure account portals
- Loan or credit card applications
- Payment pages
- Insurance claim updates
- Educational resources
- Support forms
- App download pages
- Appointment scheduling tools

With custom back-halves, teams can make each link more intuitive and action-oriented. A link like `yourbrand.co/upload-docs` is clearer than a long URL filled with numbers, symbols, or tracking parameters.

The screenshot displays the Bitly Links dashboard interface. At the top, there's a 'Create link' button. Below it is a search bar and filters for 'Filter by created date' and 'Add filters'. A summary bar shows '5,028 engagements (30 days)' and offers actions like 'Summarize my last 7 days', 'Compare my top performing links', 'Analyze my traffic sources', and 'Ask about my data...'. The main list contains three links:

Link Title	Short Link	Engagements	Date	Category	Tag
Speak to a Wealth Advisor — Book a Call	bit.ly/advisor-consult	2,122	Nov 11, 2024	Sales	Q3 Investor Update
Open a Brokerage Account — Start Investing	bit.ly/open-account	2,060	Dec 1, 2024	Acquisition	Q3 Investor Update
Free Financial Health Check — Book Now	bit.ly/health-check	1,429	Nov 8, 2024	Sales	Retirement Planning Month

Measure engagement across critical messages

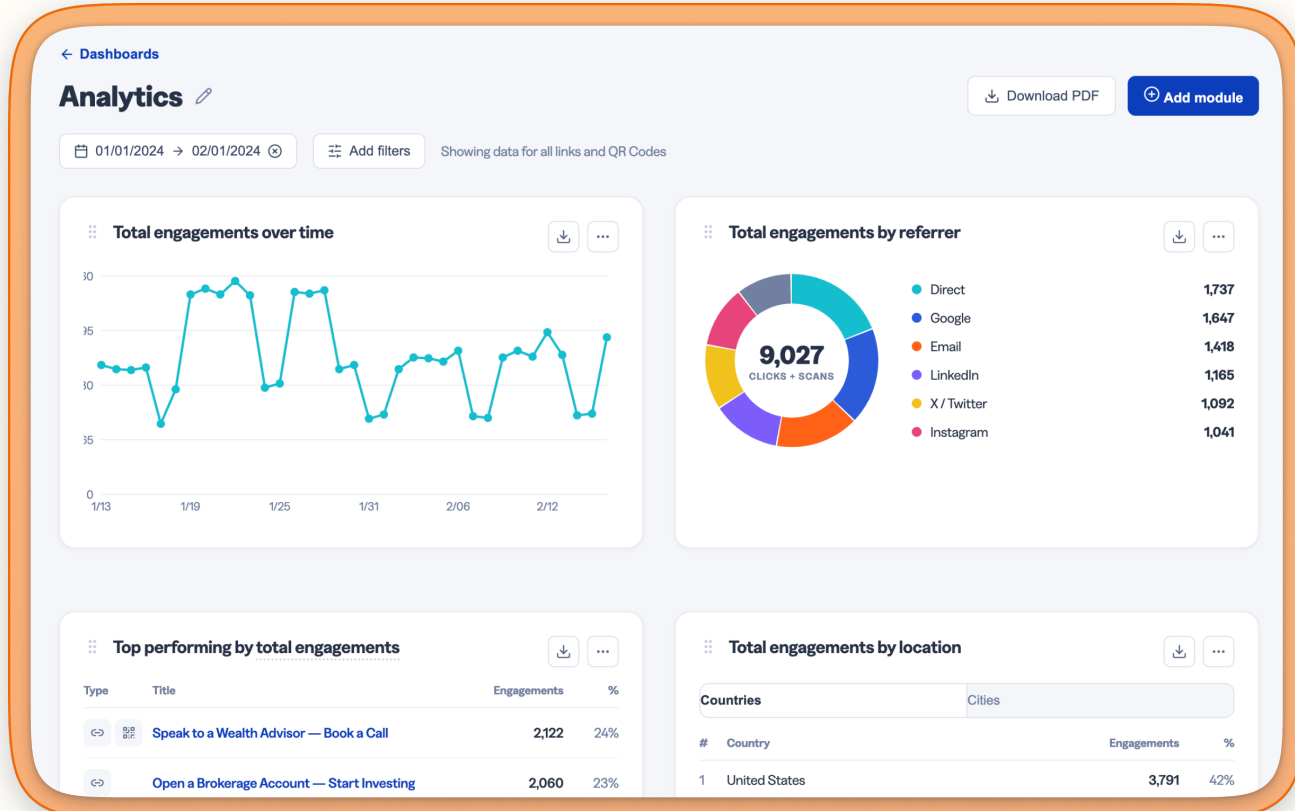
For customer communications teams, sending a message is only the first step. You also need to understand whether customers are engaging with it.

[Bitly Analytics](#) helps you see how customers interact with your links across channels. You can track which messages are driving clicks, which channels are performing best, and where customers may be dropping off.

These insights can help your team answer questions like:

- Are customers clicking payment reminders?
- Which onboarding messages drive the most engagement?
- Are SMS or email alerts performing better?
- Which product updates need clearer messaging?
- Are customers engaging more in certain regions or on certain devices?

Or just ask Bitly Assist, **“Which onboarding messages got the most clicks this week?”** and get an answer in seconds. Every click gives your team another signal to improve the customer experience.



2

Simplify onboarding and product adoption

A customer's first few interactions with your product can shape how they feel about your brand for the long haul.

Whether someone is opening a checking account, signing up for a budgeting app, applying for a loan, enrolling in autopay, or activating a new card, the onboarding experience should feel smooth and simple.

Bitly helps lifecycle marketing, customer communications, and product teams guide customers through onboarding with clear links, QR Codes, and landing pages that make each step easier to complete.

Make onboarding feel like one smooth journey

Financial onboarding often includes multiple steps, and each one is an opportunity for customers to lose momentum.

Bitly Links can help teams guide customers through moments like:

- Account setup
- Identity verification
- Document upload
- Card activation
- App download
- Direct deposit setup
- Autopay enrollment
- Preference center updates
- First transaction or transfer

Instead of asking customers to search for the right page or log in and navigate through several screens, you can send them a direct, branded link to the next best action.

For lifecycle teams, that means fewer dead ends and more completed onboarding journeys. For product teams, it means less friction between sign-up and activation.

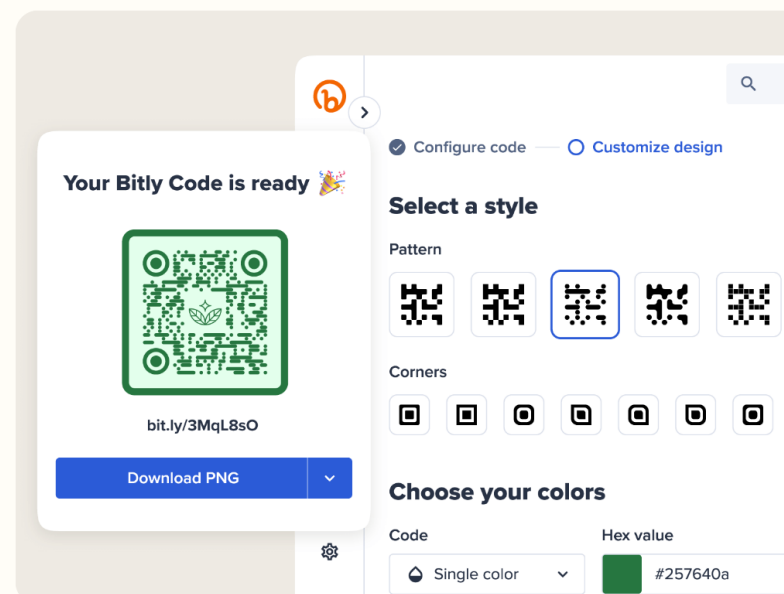
Bitly 101

You can customize every part of your QR Code in Bitly!

- **Patterns:** Choose from nine preset QR Code patterns.
- **Corners:** Elevate your QR Codes with 10 unique corner styles.
- **Color:** Bring your QR Codes to life with vibrant colors. You can choose colors for the code itself, the background, and the outer and inner corners.
- **Frames:** Make your QR Codes pop with a host of attention-grabbing frame options that entice people to scan your codes.
- **Logos & Icons:** Upload your logo for ultimate brand recognition or choose from one of several social media icons

An added bonus? Bitly seamlessly integrates with tools you already use, like [Canva](#). Connect your accounts to easily drag and drop Bitly Codes (and short links) into your designs.

You can create new QR Codes within Canva or easily insert any of the 50 most recently created codes from your Bitly account. All Bitly Codes created in Canva can be accessed again within the app or your Bitly account, so you can reuse the same codes on multiple designs



Use QR Codes to connect offline and digital experiences

Financial services still happen across a mix of physical and digital environments. Customers may encounter your brand in a branch, at an event, through direct mail, on a statement insert, or through partner materials.

Bitly Codes help turn those offline moments into digital next steps.

Use QR Codes on:

- Branch signage
- Welcome kits
- Direct mail campaigns
- Event booths
- Printed statements
- Educational handouts
- ATM signage
- Product brochures
- New card packaging

A customer can scan a QR Code to open an account, compare products, book an appointment, download your app, or learn more about a financial topic in seconds.

Help customers self-serve

Customers do not always want to call support or wait for help. Many would rather find the answer themselves, as long as it's easy.

Bitly Links and QR Codes can help customers quickly access:

- Help center articles
- FAQs
- How-to videos
- Product explainers
- Fee schedules
- Account setup guides
- Security education
- Claims or dispute resources

By making support content easier to find, teams can reduce friction for customers and help support teams focus on higher-touch issues.

Drive app engagement and self-service actions

For many fintechs and financial institutions, the app is the center of the customer experience. It's where customers check balances, move money, manage cards, review transactions, file claims, view rewards, and explore new products.

But getting customers to download the app is only the beginning. Teams also need to drive repeat engagement and help customers discover the features that make the app valuable. Bitly Links can support both.

Encourage app downloads

Across email, SMS, social, QR Codes, and digital campaigns, Bitly Links can help guide customers to your app. With mobile deep linking, you can create links that send customers to the right place based on whether they already have the app installed.

If they have the app, the link can open a specific in-app destination. If they don't, it can take them to the app store to download it.

Use this approach to promote:

- Mobile banking apps
- Insurance portals
- Budgeting apps
- Payment apps
- Investment apps
- Digital wallet features
- Rewards apps

By removing extra steps, you can make app adoption feel more natural.

Bitly 101

Access your click and scan data in one place with [Bitly Analytics](#). Our analytics dashboard comes with a set of default modules that show data like top-performing clicks and scans over time, by referrer, and by location. You can modify any of these default modules and create your own to suit your needs!

You can also view more granular data for your links, QR Codes, and landing pages. Check out what's possible below:

Links

- Total engagements
- Engagements in the last 7 days
- Week-over-week change
- Engagements over time
- Locations (city and country)
- Referrers
- Devices

QR Codes

- Total scans
- Scans over time
- Scans by location (city and country)
- Scans by browser
- Scans by operating system

Landing Pages

- Total views for your landing page and aggregate link clicks
- Views over time
- Link activity for a selected time period
- Views by referrer and device
- Views by location (city and country)

Bring customers back to useful features

Once customers have your app, the next challenge is helping them use it. Use Bitly Links in lifecycle campaigns to direct customers to specific features, such as:

- Setting up alerts
- Freezing or replacing a card
- Viewing rewards
- Making a payment
- Transferring money
- Creating a savings goal
- Uploading documents
- Reviewing policy details
- Checking claim status

The easier it is for customers to find a feature, the more likely they are to use it.

Learn what customers care about

Every click gives your team a signal. When you track engagement with different product features, educational resources, and lifecycle campaigns, you can better understand which actions customers are most interested in.

For product teams, this can help inform adoption strategy. For lifecycle teams, it can help prioritize which campaigns to test next. For customer communications teams, it can reveal where messaging needs to be clearer.

Bitly Analytics can help teams understand:

- Which app features generate the most interest
- Which lifecycle campaigns drive action
- Which channels bring customers back into the app
- Which links perform best by region or device
- Which calls to action need to be improved

That means your team can spend less time guessing and more time optimizing. In addition, [Weekly Insights](#) surfaces these patterns for you automatically, calling out things like a jump in engagement on a specific feature link, so your team doesn't have to go looking for it.

Support smarter lifecycle marketing

Lifecycle marketing in financial services is all about timing. The right message at the right moment can help customers get more value from your product, complete important tasks, and build a stronger relationship with your brand.

But lifecycle teams often manage campaigns across multiple channels, tools, and customer segments. Without clear link tracking, it can be difficult to know what's actually working. Bitly helps teams create, manage, and measure links across the full customer lifecycle.

Personalize campaigns by customer need

Financial services customers have different goals depending on their stage, product, and behavior. A new checking account customer may need onboarding support. A credit card customer may be interested in rewards. A small business owner may need cash flow resources. An insurance customer may need help filing a claim.

With Bitly Links, lifecycle teams can create targeted campaigns for different audiences and use descriptive links for each action.

For example:

- [yourbrand.co/start-saving](#)
- [yourbrand.co/activate-card](#)
- [yourbrand.co/rewards](#)
- [yourbrand.co/small-business](#)
- [yourbrand.co/file-claim](#)
- [yourbrand.co/auto-pay](#)

Use these links across SMS, email, push notifications, in-app messages, and paid campaigns to guide each customer to a relevant next step.

Keep campaigns current

Financial products, rates, offers, and seasonal campaigns can change quickly. When destinations move or promotions expire, outdated links create a poor customer experience.

With Bitly, teams can redirect links when destinations change. That means a link printed in a brochure, included in a customer email, or shared in a campaign can be updated to point to a new destination without starting from scratch.

This flexibility is useful for:

- Limited-time offers
- Product launches
- Updated application pages
- Seasonal campaigns
- New educational resources
- Regulatory or policy updates
- Event registration pages
- Partner campaigns

Instead of sending customers to an error page or outdated experience, you can keep every touchpoint moving toward the right destination.

Compare performance across channels

Lifecycle teams need to know which messages are driving action. Bitly Analytics makes it easier to compare engagement across channels and campaigns.

You can track:

- Clicks by campaign
- Clicks over time
- Referring channels
- Device types
- Geographic locations
- Top-performing links
- Week-over-week changes

Instead of building that comparison yourself, [Weekly Insights](#) surfaces the “what changed” summary for you automatically—like a jump in clicks from a specific channel or a shift in which campaign is leading. And if you want to dig deeper, you can ask Bitly Assist a follow-up question directly, like **“Why did Facebook traffic spike this week?”** and get an answer without leaving the page.

These insights help teams improve message timing, refine calls to action, and invest in the campaigns that drive meaningful engagement.

Create centralized destinations for key resources

Financial services customers often need access to a lot of information: product details, support resources, educational content, account actions, offers, disclosures, calculators, app links, and more. But sending customers to a generic homepage can create extra work for them. Bitly Pages help teams create mobile-friendly landing pages that organize important links in one place.

Create a hub for customer resources

With Bitly Pages, teams can create landing pages for specific audiences, products, campaigns, or moments in the customer journey.

Use Bitly Pages to create hubs for:

- New customer onboarding
- Credit card rewards
- Small business banking resources
- Mortgage or loan education
- Insurance policy support
- Financial wellness content
- App feature education
- Event or webinar registration
- Branch or location-specific resources

Instead of forcing customers to search for what they need, you can give them a simple starting point.

Support product education

Financial products can be complex. Customers may need help understanding how to get started, what features are available, or how to choose the right next step.

A Bitly Page can bring together:

- Product explainers
- Comparison guides
- How-to videos
- Application links
- FAQs
- Support resources
- Calculators
- Contact options

Bitly 101

With [Bitly Pages](#), you can create mobile-friendly landing page destinations for your short links and QR Codes.

Use Bitly Pages to:

- Showcase key resources
- Convert audiences
- Track performance
- Share multiple links from one destination
- Create campaign-specific pages
- Embed videos and images
- Customize layouts, colors, fonts, and visuals
- Measure views, clicks, referrers, devices, and locations

For product teams, these landing pages can help customers better understand and adopt key features. For lifecycle teams, they can become destinations for targeted campaigns. For customer communications teams, they can reduce confusion by giving customers a clear place to go.

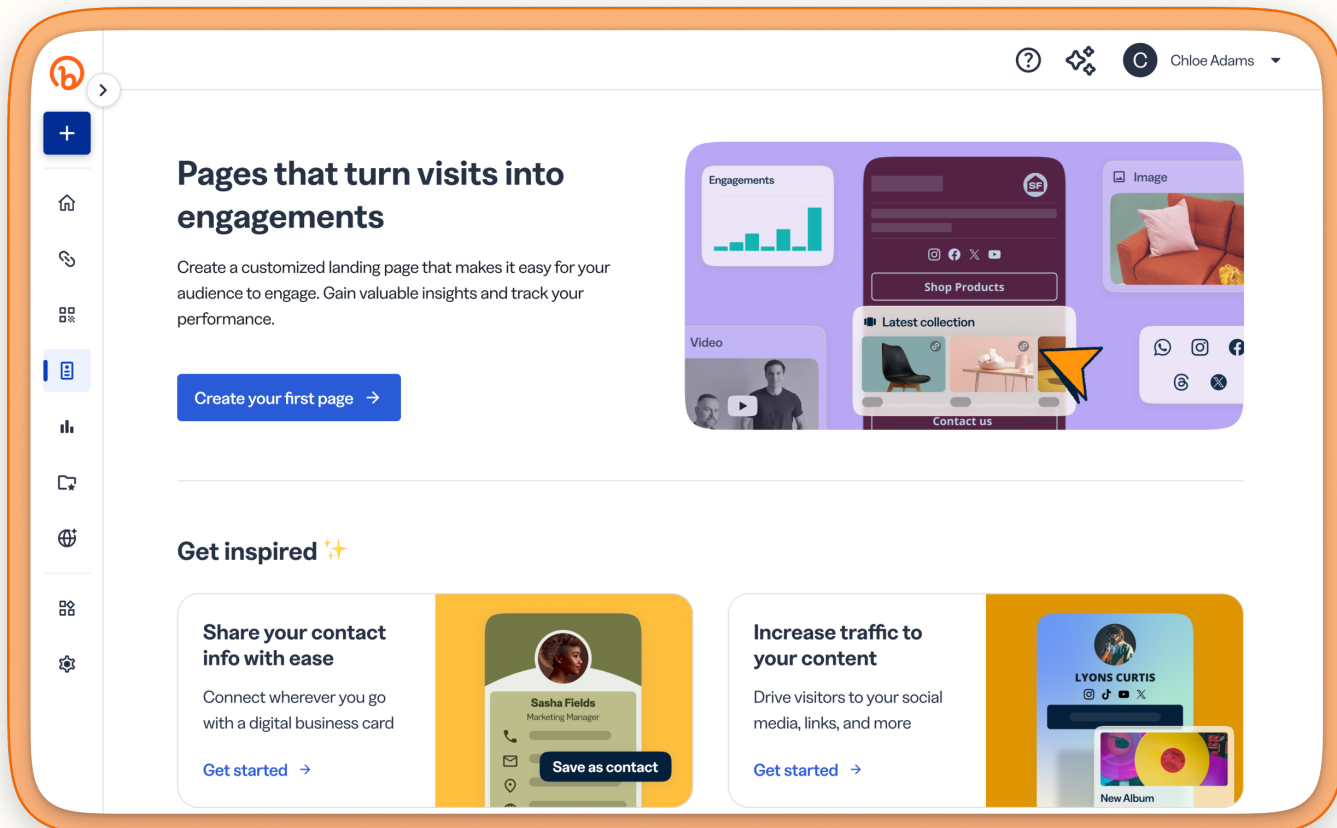
Build pages for different audiences

Not every customer needs the same information. Bitly Pages make it easy to create targeted destinations for different segments.

For example:

- A first-time banking customer may need account setup and debit card activation resources.
- A small business customer may need invoicing, payment, and cash flow tools.
- A borrower may need application status updates and document upload instructions.
- A rewards customer may need redemption options and app download links.
- An insurance customer may need claim status, policy details, and support links.

By creating audience-specific pages, your team can make each experience feel more relevant and easier to navigate.



6

See how Bitly works across the customer journey

Now it's time to put all of these pieces together. How does Bitly fit into the customer journey from first touch to long-term loyalty?

Let's introduce our fictional customer, Maya.

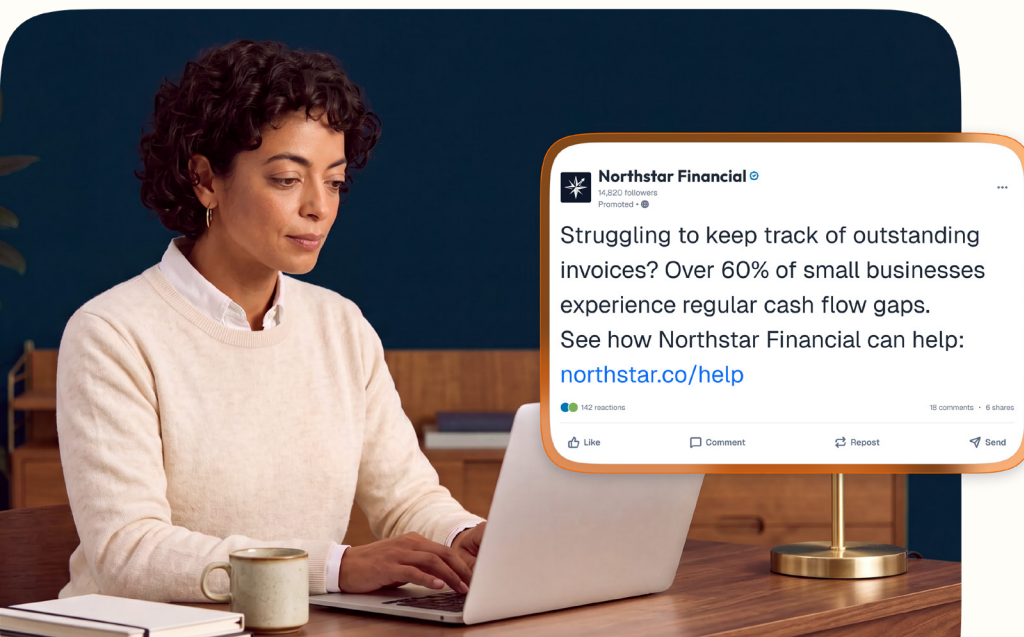
Maya owns a small creative agency and is looking for a better way to manage her business finances. She needs a business checking account, a debit card for expenses, and an easy way to track payments from clients. She discovers a fintech company called Northstar Financial. Northstar offers digital banking and money management tools for small businesses. Let's walk through Maya's journey and see how Northstar could use Bitly to make every touchpoint simpler and more measurable.

Promotion

Maya first hears about Northstar Financial through a sponsored LinkedIn post about better cash flow management for small businesses. The post includes a branded Bitly Link that takes her to a landing page with resources for business owners.

Later that week, she sees a direct mail piece from Northstar with a QR Code. The call to action invites her to compare business checking options. She scans the Bitly Code and lands on a mobile-friendly page with product details, customer stories, and a link to start an application.

Northstar's marketing team can track clicks and scans from each campaign, helping them understand whether social, direct mail, or partner campaigns are driving the most interest. Bitly's Weekly Insights flags that invoicing links are gaining traction among small business customers—so the team doesn't have to go digging to spot the trend.



Application

Maya decides to apply for a business checking account. After she starts the application, Northstar sends her a confirmation text with a branded short link to continue where she left off.

A few hours later, she receives another message asking her to upload a missing document. The Bitly Link uses a clear custom back-half, so she understands the action immediately: [northstar.co/upload-docs](#).

Instead of logging in, searching for the right page, or contacting support, Maya clicks the link and completes the step in minutes.

Onboarding

Once Maya's account is approved, Northstar sends her a welcome email with a Bitly Page built specifically for new business banking customers.

The page includes links to:

- Activate her debit card
- Download the mobile app
- Set up account alerts
- Add team members
- Connect accounting software
- Learn how to send and receive payments
- Contact support

Maya downloads the app using a Bitly Link. Since she's on her phone, the link takes her directly to the app store. After she installs the app, future links can take her to specific in-app destinations.

Engagement

A few weeks later, Northstar wants to help Maya get more value from her account. The lifecycle team sends a series of helpful SMS and email messages with branded Bitly Links.

One message encourages her to set up low-balance alerts. Another introduces a new invoicing feature. Another shares a guide to managing quarterly tax payments.

Each link gives Northstar more insight into what Maya and customers like her are interested in. If invoicing links see strong engagement among small business customers, the product and lifecycle teams can use that insight to prioritize future campaigns.

Support

Maya eventually has a question about a transaction. Instead of searching through the app, she scans a QR Code from a digital statement that takes her directly to a support page.

The page gives her options to:

- Review common transaction questions
- Start a secure support request
- Chat with the support team
- Learn how to dispute a charge

Because Northstar uses Bitly Analytics, the customer communications team can see which support links customers use most often and identify where more education may be needed.

Loyalty

After several months, Maya is using Northstar regularly. She receives a personalized email inviting her to join a webinar on managing business cash flow. The email uses a branded Bitly Link that takes her to a registration page.

After the webinar, Northstar sends a follow-up Bitly Page with the recording, related resources, and product features that may be relevant to her business.

Over time, Maya's experience with Northstar feels consistent, useful, and easy to navigate. Every click and scan helps Northstar understand how to serve customers like her better.

7

Create meaningful and measurable experiences

In financial services and fintech, every customer connection carries weight. A link in a payment reminder. A QR Code on a branch poster. A landing page for new customers. An app download campaign. A product education email. Each touchpoint is a chance to build trust, reduce friction, and help customers take the next best step.

Bitly helps financial services and fintech teams create experiences that are:

- Clear, with branded links customers can recognize
- Convenient, with QR Codes and landing pages that guide action
- Flexible, with destinations that can be updated as campaigns change
- Measurable, with analytics and AI-powered insights across clicks, scans, channels, and locations that tell you not just what happened, but what to do next
- Scalable, with tools that support customer communications, lifecycle marketing, and product adoption

Whether you're helping customers open an account, complete onboarding, download your app, manage payments, find support, or discover a new product, Bitly helps you connect every interaction and understand what's working.

Ready to put Bitly to work for your financial services business?

Let's get started

