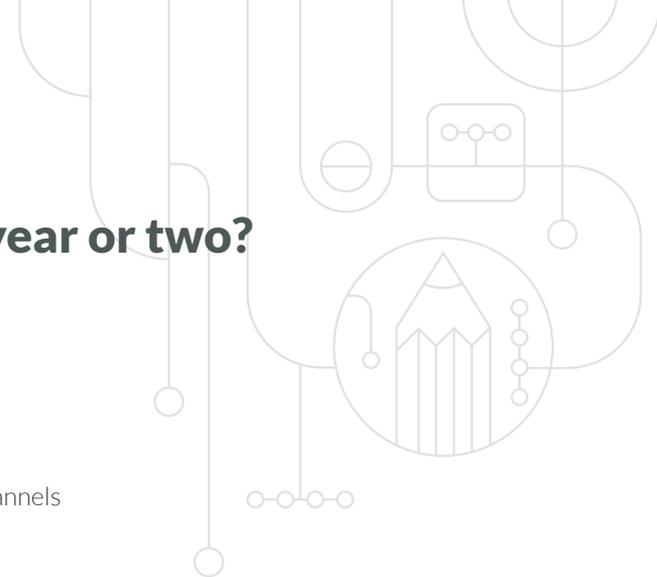


Worksheet 1: Setting Priorities

What are your marketing priorities for the next year or two?

Check all that apply.

- | | |
|---|---|
| <input type="checkbox"/> Customer/Member Account Acquisition | <input type="checkbox"/> Loan Growth |
| <input type="checkbox"/> Increasing Cross-Sell Opportunities, Deepen Relationships, Improve Share-of-Wallet | <input type="checkbox"/> Increased Adoption of Digital Channels |
| <input type="checkbox"/> Boosting Client Retention | <input type="checkbox"/> Deposit/Checking Growth |



What are the top product priorities for this year?

Assess your top product priorities below. Check all that apply.

	Low	Medium	High		Low	Medium	High
Mortgage Loans/Refinancing Products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Credit Cards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mobile Banking Solutions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Financial Education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Checking Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Online Banking/Bill Pay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Banking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Free Checking Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Auto Loans/Refinancing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Savings Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Home Equity Loans/Lines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Interest Checking Accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Lending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Retirement Products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Worksheet 2: Audience Identifier

This worksheet will further help you structure your surveys and interviews—ensuring that you have all the information you need to create personas that accurately reflect your customer’s and prospect’s needs and goals. This, in turn, will help you develop your marketing strategy, determine the best content, and engage your audience across the most appropriate platforms.

Persona

Demographics Information Age range, sex, occupation, income, etc.

Values Identify common values.

Goals What are their hopes and dreams? Do they want to own a home, a car? What do they want to accomplish next?

Consumer Behaviors Identify common lifestyle behaviors, i.e. do they all own cars, live in the suburbs, own homes?

Questions What questions would they have about a product or services, where in the buying process are they?

Highlight Quote from interview.

Worksheet 3: Content Audit Checklist

In order to market to the personas that you have identified you need to have the right content for them. Use this worksheet to identify the content you already have and then identify gaps in content for your buying stages and personas.

	Buying Stages	Persona	Content Title	Content Type
Awareness Ex: how-to-guides, news/editorial content, blog posts				
Consideration Ex: webinars, eBooks, videos, and podcasts				
Decisions Ex: trial offer, product literature, vendor or product comparisons, and case studies				

Worksheet 4: Channel Efficacy

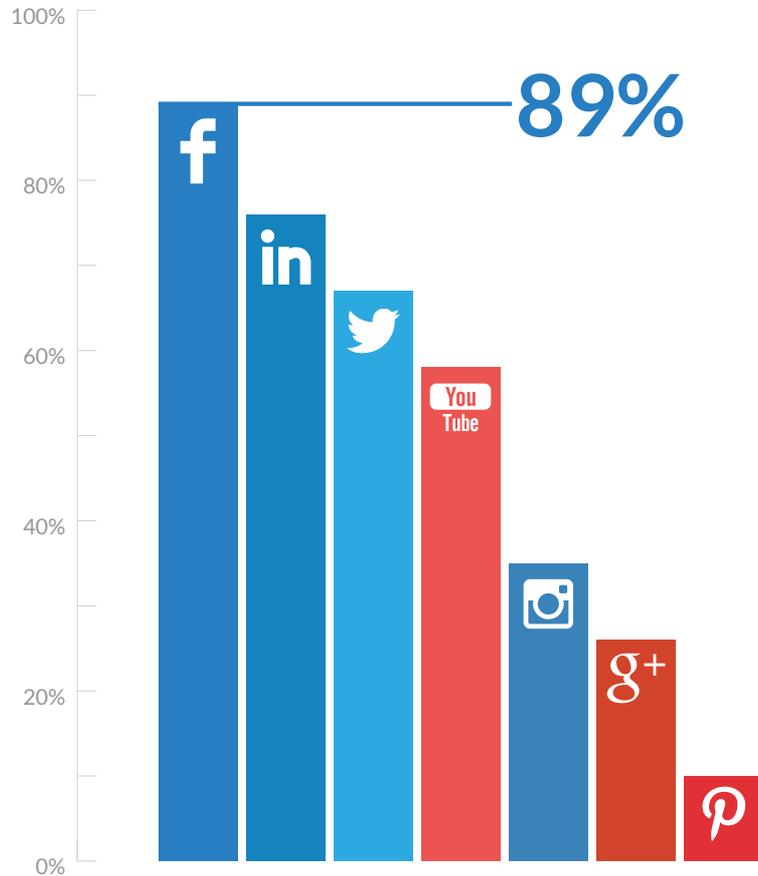
To get the most out of each of your channels you should be checking your financial institution metrics. Pull the information on each of your channels and then fill out the grid to see where you stand and where you can improve. This is where financial education can help, you get higher response rates and improve your overall strategy by integrating financial education into your plan.

Distribution Channels	Institution Metrics		Notes
Email	Average Open Rate:	Click-Through Rate:	
	The Financial Industry average is 16% Open Rate* and 5% Click-through		
Website	Visitors Per Month:	Conversions:	
Blog	Blogs posted per Month:	Average Traffic on Blog:	
	B2C companies that blogged 11+ times per month got more than 4X as many leads than those that blogged only 4-5 times per month.		
Paid Media	What are you currently using:	Average conversion Rate:	
Direct Mail	Response Rate:		
	The industry standard for direct mail is a 5.3% response rate to house lists and 2.9% to prospect lists.		
In-Branch	Teller Conversions		
Other: Face-to-Face Workshops/ Outbound Calling			

Worksheet 4 Continued: Which Social Channels Are You Using?

Figure 7 Use of Social Media 2013-2017

According to the 2017 Financial Marketing Trends, Digital Banking Report,²⁴ financial institutions are currently using:



On average, financial institutions generated **3,163 leads per month and 2,489 Marketing Qualified Leads (MQLs).**²⁵

What channels are you currently using?

Current number of followers in each channel?

What are you looking to accomplish in each channel?

Ex: Acquisition, Engagement, or Service

Worksheet 5: Planning Your Year

Now that you have set your marketing goals, set up your personas, audited your content, and figured out your channels, it's time to put together a final plan for 2018.

1. What are your priorities for the next year or two?

See Worksheet 1: Setting Priorities

2. What are your top product priorities?

See Worksheet 1: Setting Priorities

3. Who are your core personas?

See Worksheet 2: Audience Identifier

3a. What channels are you planning on using to market your personas?

See Worksheet 4: Channel Efficacy

4. Where are you content gaps?

See Worksheet 3: Content Audit Checklist

5. What channels will you be working to optimize?

See Worksheet 4: Channel Efficacy

6. What content can you use to optimize these channels?

Suggestion: White papers, videos, guidebooks

6a. Where will you be using financial education to get higher conversions?

Suggestions: Email, social posts, and Ads

