2020 WBA MARKETING WORKSHOP

# Strategic Marketing
*Virtual Workshop Series*

*PRESENTED BY*
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Financial Marketing Solutions

August 2020

## Workshop Agenda

~~Session 1:~~
~~Today's Marketplace~~
~~Understanding Brand~~

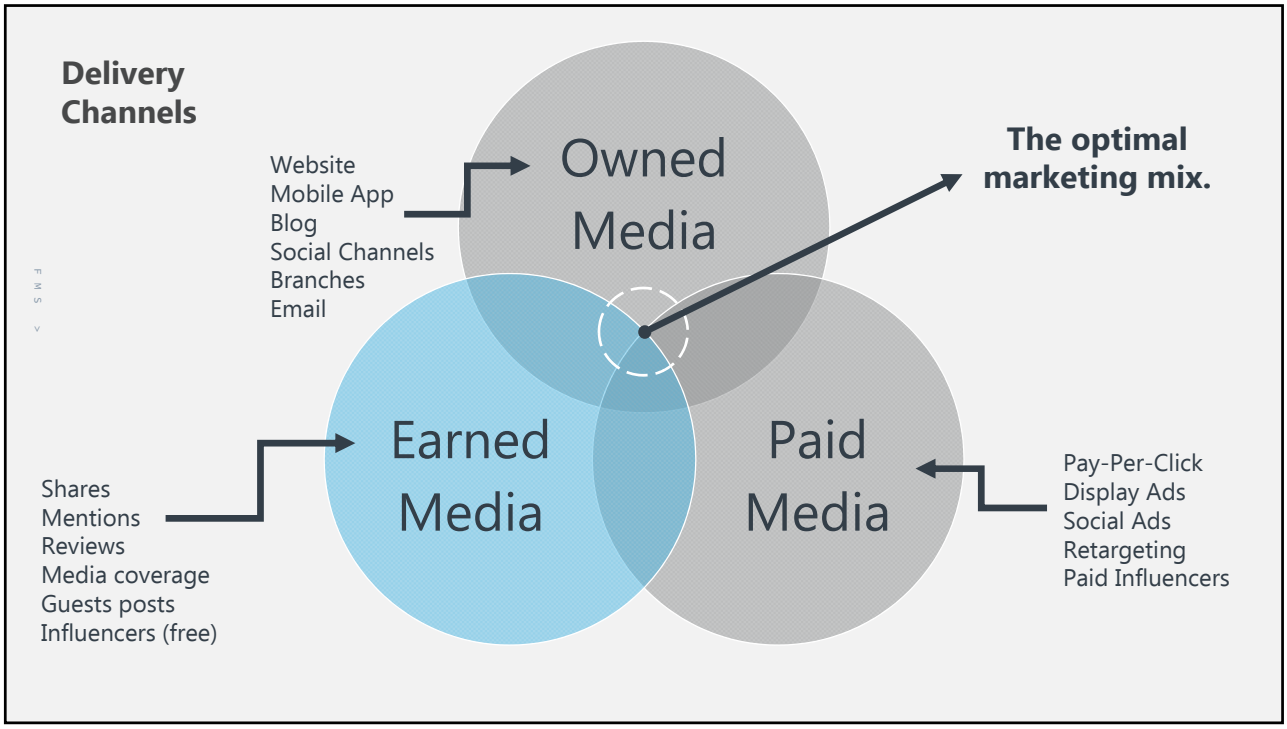
~~Session 2:~~
~~Strategy Development~~
~~Creative Messaging~~
~~Content Development~~

~~Session 3:~~
~~Delivery Channels~~
~~Owned Media~~
~~Paid Media~~

**Session 4:**
**Earned Media**
**Implementation**
**Measurement**

## Group Discussion

## Earned Media




## Earned Media

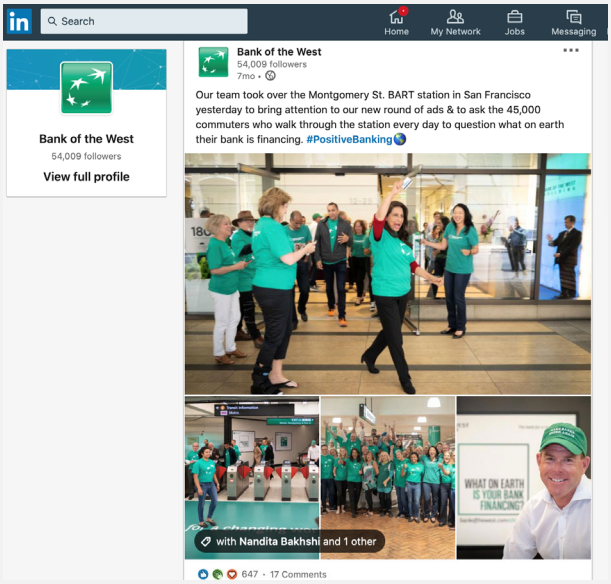
Unpaid opportunities for brands to be written about, featured on prominent platforms, publicized through individual influencers in the industry, and linked back to. When done correctly, earned media opens up communication channels with your targeted audience.

We Used To Call This Publicity (PR)

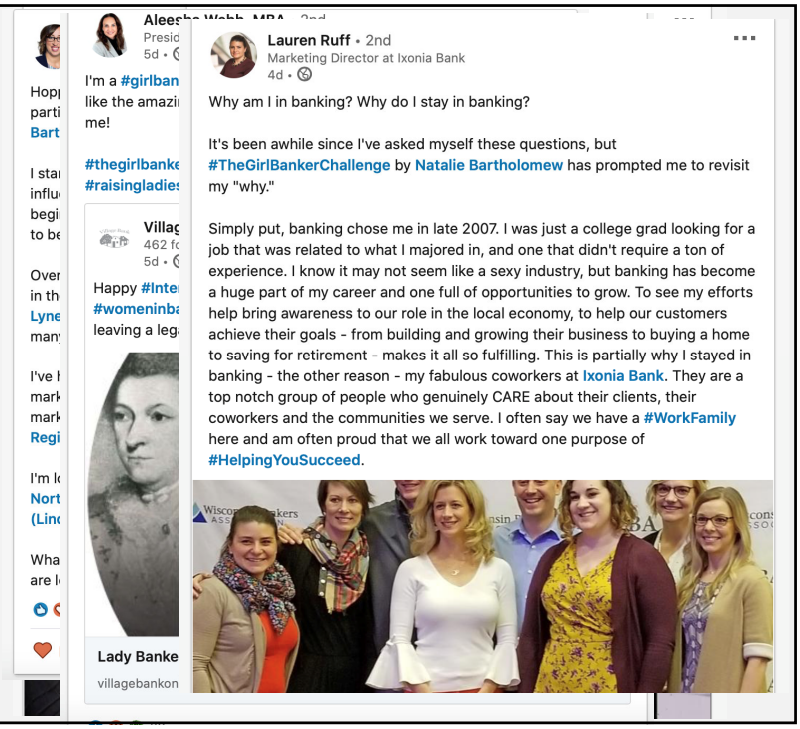
A Nielsen's study found that about 83% of people completely trust recommendations they get from family and friends.

## IHOB

## Bank of the West Subway Takeover



## #TheGirlBankerChallenge




## Strategic Ways to Receive Earned Media

## Build Relationships With The Press

Remember, the most effective way to cultivate earned media opportunities is to target publications and organizations with relevant audiences and present value to their readers.

Source: https://www.saltedstone.com/blog/understanding-earned-media-tactics-best-practices-measuring-success

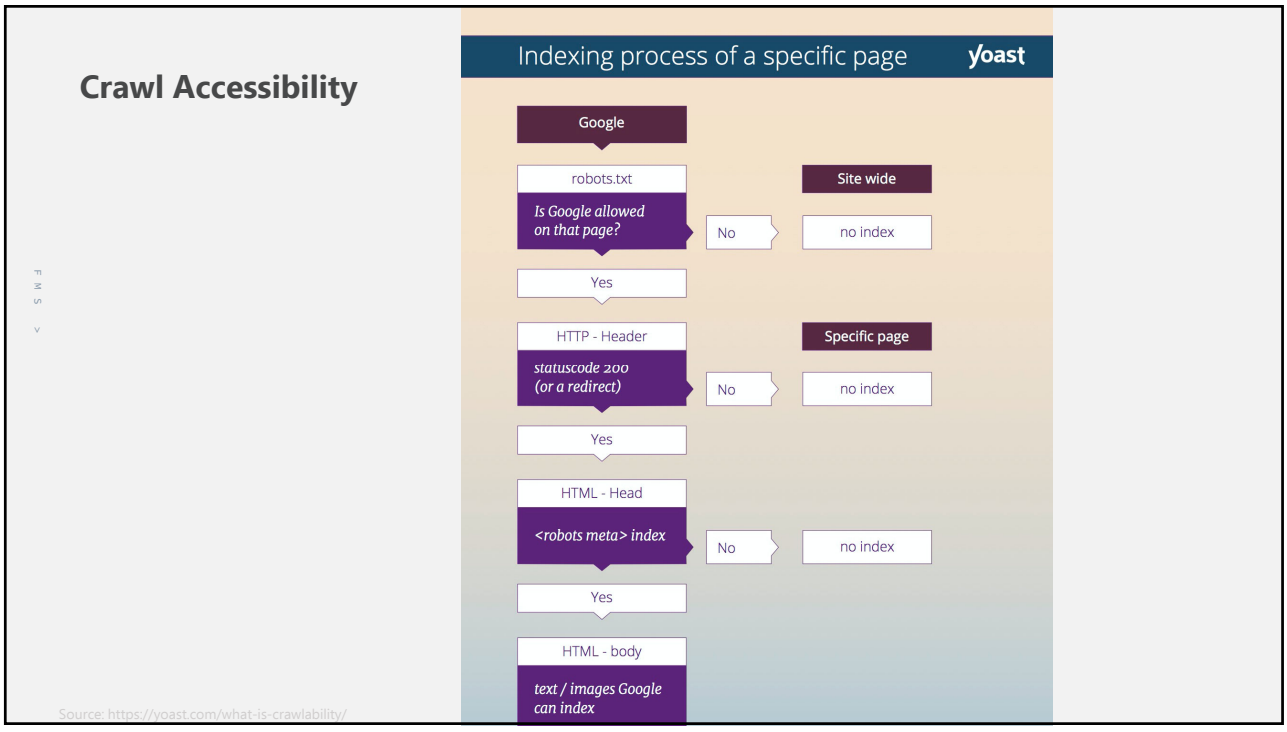
## Search Engine Optimization (SEO)

The process of increasing the quality and quantity of website traffic by increasing the visibility of a website or a web page to users of a web search engine. SEO refers to the improvement of unpaid results and excludes direct traffic/visitors and the purchase of paid placement.

**White Hat SEO** - techniques, best practices, and strategies that abide by search engine rule, its primary focus to provide more value to people.

**Black Hat SEO -** techniques and strategies that attempt to spam/fool search engines. While black hat SEO can work, it puts websites at tremendous risk of being penalized and/or de-indexed (removed from search results) and has ethical implications.

Mozlow's Hierarchy of SEO Needs
Improves competitiveness
Improves competitiveness
Snippet/ schema markup to stand out in SERPs
Title, URL, & description to draw high CTR in the rankings
Share-worthy content that earns links, citations, and amplification
Great user experience including a fast load speed, ease of use, and compelling UI on any device
Keyword optimized to attract searchers & engines
Compelling content that answers the searcher's query
Crawl accessibility so engines can reach and index your content
Essential to rankings
Essential to rankings


Crawl Accessibility
Indexing process of a specific page
yoast
Google
robots.txt
Is Google allowed on that page?
No
Site wide
no index
Yes
HTTP - Header
statuscode 200 (or a redirect)
No
Specific page
no index
Yes
HTML - Head
<robots meta> index
No
no index
Yes
HTML - body
text / images Google can index
Source: https://yoast.com/what-is-crawlability/

## High Quality Content

The best content should solve for the searcher's intent.

1. What will my audience be searching for?
2. What do they want to know about?
3. What will resonate with them?
4. What are the most frequently asked questions you hear?
5. What do our prospects and customers need help with?
6. What are industry bloggers, social media, and even our competitors talking about?
7. Keep popular "solution" keywords in mind – i.e. "how to", "near me", etc.

## Keyword Research

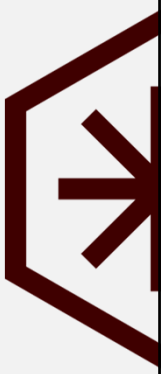
The process of finding and analyzing actual search terms that people enter into search engines. Keyword research tells you what topics people care about. Google doesn't care about the keyword itself as much as they used to. The intent behind that keyword, and whether or not a piece of content solves for that intent is really what Google is looking at.

## Keyword Exercise

1. Make a list of important, relevant topics based on what you know about your bank – 5 to 10 topic buckets
2. Fill in these topic buckets with keywords
3. Research related search terms
    - See what words you're already showing up for in the organic listings section of Google Analytics
    - Look at your own website's site search data
    - Use Google Keyword Planner - https://ads.google.com/home/tools/keyword-planner/
    - Use Google Trends - https://trends.google.com/trends/?geo=US
    - Go to Google.com and take a look at the related search terms that appear when you plug in a keyword. Go at least three layers deep.
    - Go to YouTube.com and do the same

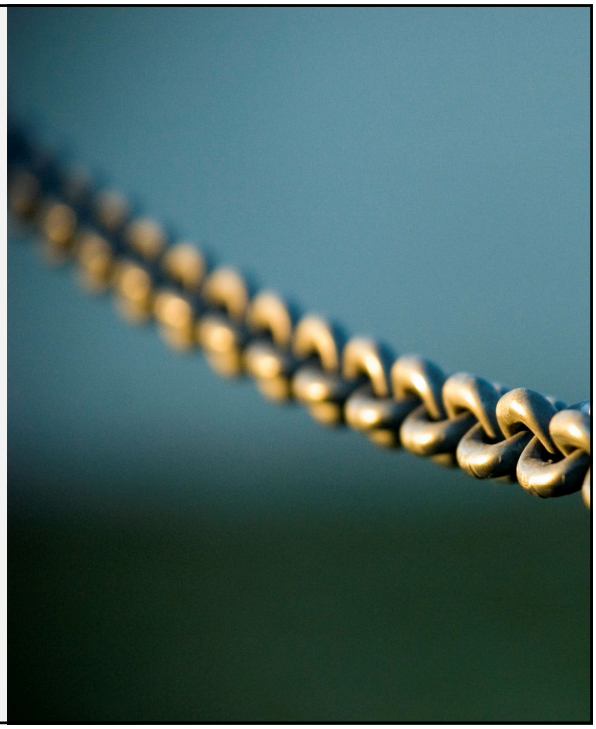
## Build Good Links

Link building is the process of acquiring hyperlinks from other websites to your own. Search engines use links to crawl the web; they will crawl the links between the individual pages on your website, and they will crawl the links between entire websites. They look at the number of links pointing to a particular page on your website from external websites, as well as the quality of those external websites. Generally speaking, the more high-quality websites that link to you, the more likely you are to rank well in search results.



## How to Start Building Links

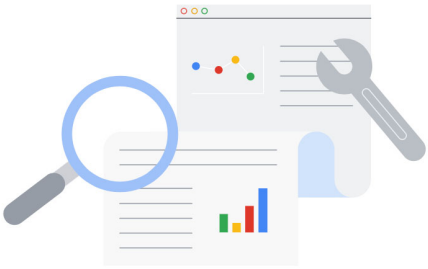
1. Find your asset (i.e. content, data, etc.)
2. Identify what type of links you need (homepage, deep page, brand name, keywords)
3. Find link targets (types of people who would be interested).
4. Find your "hook" for that audience target (i.e. news, funny, political, data visualization, etc.)
5. Identify your target audience for links
6. Finding link targets
7. Make contact – be personable, honest, forthcoming,
8. Follow up – Contacted? Replied? Linking?



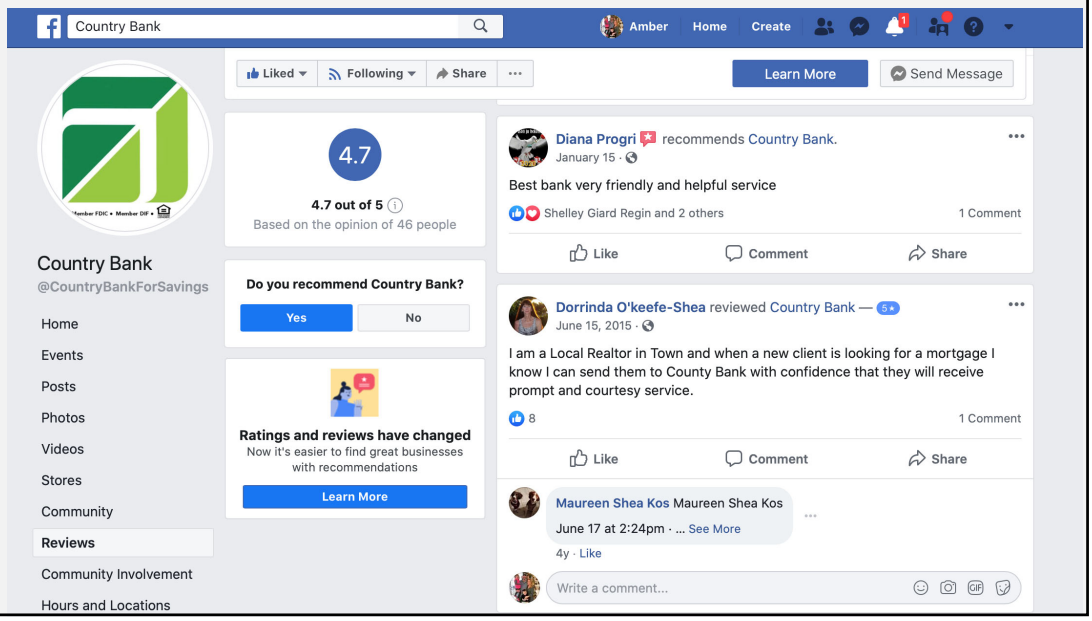
## Google Search Console

A free service offered by Google that helps you monitor, maintain, and troubleshoot your site's presence in Google Search results. It can specifically:

- Confirm that Google can find and crawl your site
- Help fix indexing problems
- Help monitor spam issues to keep your site clean,
- Help you submit new content to crawl and remove old content
- Show you which sites link to your website



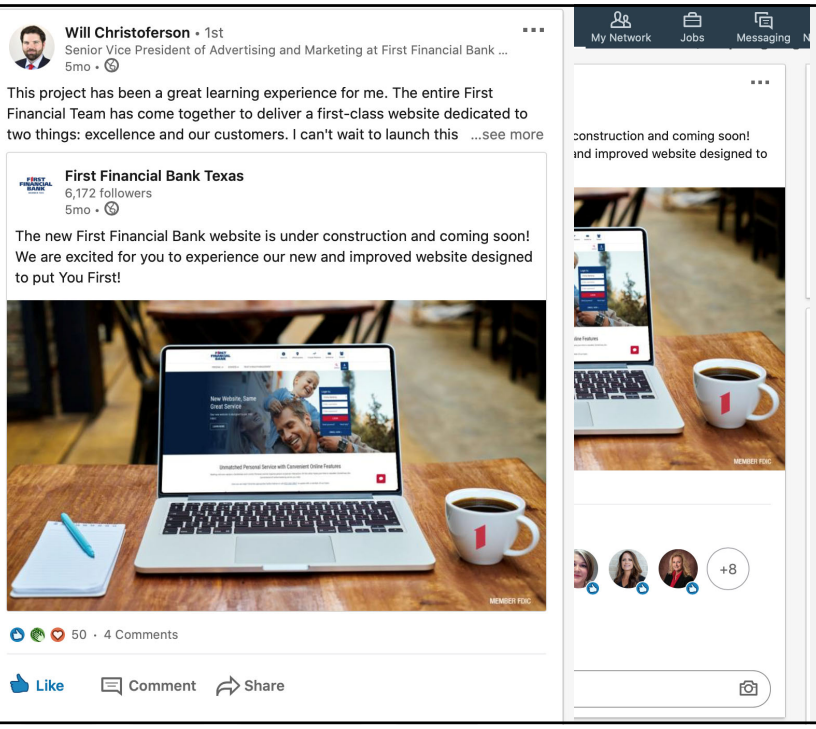
## Social Reviews




## External Reviews: Bankrate's Best Online Savings Accounts March 2020

| | | | | |
|---|---|---|---|---|
| Vio Bank<br>Member FDIC<br>Savings Account | 1.85 %<br>As of: Sat Mar 14 | $ 100 | $ 463<br>Over 1 Year | READ REVIEW<br>OFFER DETAILS |
| TotalDirectBank<br>Member FDIC<br>Money Market Account<br>Not Rated<br>Available locally | 1.85 %<br>As of: Sat Mar 14 | $ 2,500 | $ 463<br>Over 1 Year | OFFER DETAILS |
| UFB Direct<br>Member FDIC<br>Savings Account | 1.80 %<br>As of: Fri Mar 13 | $ 0 | $ 450<br>Over 1 Year | READ REVIEW<br>OFFER DETAILS |
| DollarSavingsDirect<br>Member FDIC<br>Savings Account<br>Not Rated | 1.80 %<br>As of: Fri Mar 13 | $ 1 | $ 450<br>Over 1 Year | OFFER DETAILS |
| UFB Direct<br>Member FDIC<br>Money Market Account | 1.80 %<br>As of: Fri Mar 13 | $ 5,000 | $ 450<br>Over 1 Year | READ REVIEW<br>OFFER DETAILS |

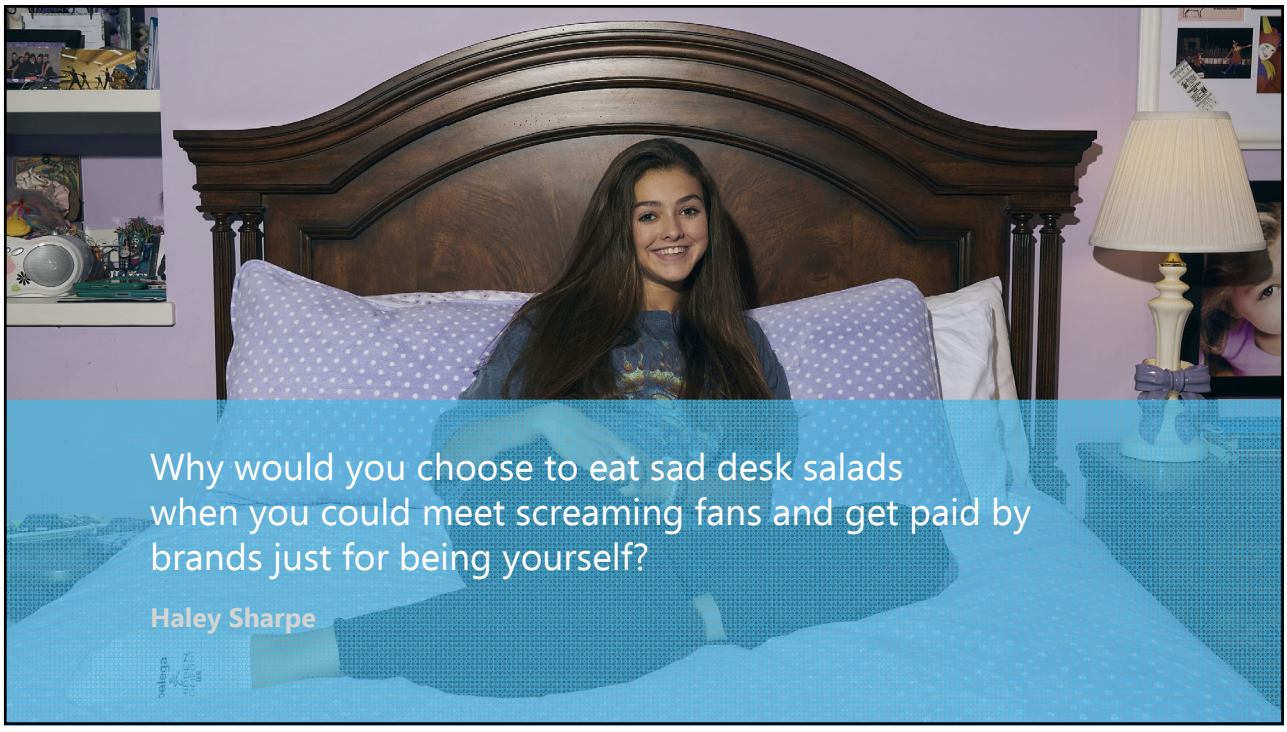
## Social Selling




## Employee Advocacy

Source: Sprout Social

Micro Influencer Marketing is Growing
By the end of 2020, influencer marketing is on target to become a $10 billion industry.


Why would you choose to eat sad desk salads when you could meet screaming fans and get paid by brands just for being yourself?
Haley Sharpe

## Millennial Farmer

**Jody Guetter, CFMP** • 1st
VP/ Director of Marketing and Sales
1yr • Edited •

With over 200k subscribers to his YouTube channel and a major social influencer in the ag community, Zach Johnson , the MN Millennial Farmer is reshaping the face of ag. We are thrilled to have him as a regular contributor on the Minnwest Bank blog. Check it out!

#farmers #banking #communitybank #millennials

**Minnwest Bank**
443 followers
1yr •

We are excited to announce that the MN Millennial Farmer, Zach Johnson, will be a contributing author on the Minnwest blog over the next year! Be sure to check our blog to hear more from the MN Millennial Farmer. This month, Zach shares with us who he is as a producer and how he got his start. Read the full article today! Member FDIC.

**MN Millennial Farmer: Who I am as a producer and how I ended up here**

minnwestbank.com

## Paid Media

03/28/2020
12:01 PM

03/28/2020
9:01 AM

**Community Bank of the Chesapeake**
Published by Social IQ [?] · March 28 ·

The Community Cash Mob is back in action - digitally! Help support our local business community by ordering pick-up or delivery from local restaurants. The first 40 people per participating business will receive $5 off their order. Order online or call in using code CASHMOB5 to receive $5 off your meal. For complete details and list of participating local restaurants, please visit https://f1q.co/2y91oel. #communitycashmob #lovefxbg #somdishungry #virginiaeatslocal #eatlocal

With ongoing COVID-19 regulations, many local businesses are struggling. Help us reinvest in our community by eating local! As always, please let us know if you are experiencing financial difficulty, we stand by ready to help you.

Colonial Tavern Home to the Irish Brigade Eileen's Bakery & Cafe Fahrenheit 132 Fahrenheit 132 FoodE Harry's Alehouse J. Brian's Tap Room Orofino Restaurant Sedona Taphouse Brick Wood Fired Bistro Caney Creek Catering Co. Captain Smith's Seafood The CD Cafe Ledo Pizza Pollo Delicioso Apple Spice Junction LaPlata The All American Steakhouse Waldorf The Honey Baked Ham Company Pizza Hotline La Plata, MD Pizza Hotline Charlotte Hall, MD Rita's Italian Ice & Frozen Custard Smokers Delight BBQ, LLC Blue Wind Gourmet Chief's - Your Neighborhood Bar Do Dah Deli Jessie's Kitchen Old Line Restaurant & Pub Olde Town Pub Tequila Grill & Cantina The Front Porch in Leonardtown The Leonardtown Grille The Rex

**Performance for Your Post**

**8,999** People Reached

**228** Reactions, Comments & Shares

| | | |
|---|---|---|
| 146 Like | 86 On Post | 60 On Shares |
| 15 Love | 5 On Post | 10 On Shares |
| 1 Wow | 0 On Post | 1 On Shares |
| 3 Comments | 0 On Post | 3 On Shares |
| 63 Shares | 61 On Post | 2 On Shares |

**435** Post Clicks

| | | |
|---|---|---|
| 16 Photo Views | 44 Link Clicks | 375 Other Clicks |

NEGATIVE FEEDBACK

| | |
|---|---|
| 1 Hide Post | 1 Hide All Posts |
| 0 Report as Spam | 0 Unlike Page |

Insights activity is reported in the Pacific time zone. Ads activity is reported in the time zone of your ad account.

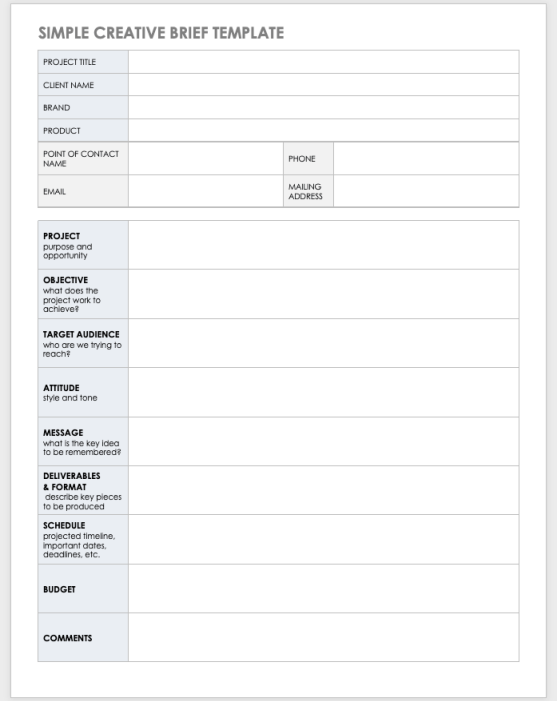
## KPIs for Tracking Earned Media Success

- Organic and referral traffic
- Organic search results
- Brand mentions
- Social media engagement (likes, comments, shares)
- Word of Mouth
- Lead sources

# Implementation

(of all marketing initiatives)

## Build a Creative Brief



SIMPLE CREATIVE BRIEF TEMPLATE

| | | | |
|---|---|---|---|
| PROJECT TITLE | | | |
| CLIENT NAME | | | |
| BRAND | | | |
| PRODUCT | | | |
| POINT OF CONTACT NAME | | PHONE | |
| EMAIL | | MAILING ADDRESS | |

| | |
|---|---|
| **PROJECT** purpose and opportunity | |
| **OBJECTIVE** what does the project work to achieve? | |
| **TARGET AUDIENCE** who are we trying to reach? | |
| **ATTITUDE** style and tone | |
| **MESSAGE** what is the key idea to be remembered? | |
| **DELIVERABLES & FORMAT** describe key pieces to be produced | |
| **SCHEDULE** projected timeline, important dates, deadlines, etc. | |
| **BUDGET** | |
| **COMMENTS** | |

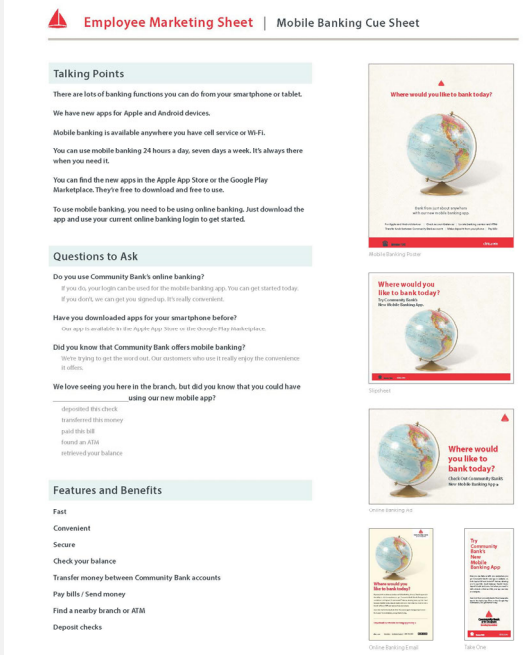
## Build a Realistic Production Timeline

- Creative Brief
- Concept Work
- Copywriting
- Design
- Destination
- Programming
- Formatting / sizing for placement
- Review
- Revisions
- Compliance
- Testing
- Media buying
- Launch
- Measurement

## Implementation

- Communication with the branches / staff is critical
- Create a campaign overview
- Share creative
- Timeline
- Collaborate with sales to develop training and sales sheets that includes product features and benefits, trigger identifiers, samples questions and "The Why?"
- What is being measured?
- Ensure bandwidth for staff/operations

## Branch Sales Sheet >



Employee Marketing Sheet | Mobile Banking Cue Sheet

**Talking Points**

There are lots of banking functions you can do from your smartphone or tablet.

We have new apps for Apple and Android devices.

Mobile banking is available anywhere you have cell service or Wi-Fi.

You can use mobile banking 24 hours a day, seven days a week. It's always there when you need it.

You can find the new apps in the Apple App Store or the Google Play Marketplace. They're free to download and free to use.

To use mobile banking, you need to be using online banking. Just download the app and use your current online banking login to get started.

**Questions to Ask**

Do you use Community Bank's online banking?
If you do, your login can be used for the mobile banking app. You can get started today.
If you don't, we can get you signed up. It's really convenient.

Have you downloaded apps for your smartphone before?
Our app is available in the Apple App Store or the Google Play Marketplace.

Did you know that Community Bank offers mobile banking?
We're trying to get the word out. Our customers who use it really enjoy the convenience it offers.

We love seeing you here in the branch, but did you know that you could have _____ using our new mobile app?
- deposited this check
- transferred this money
- paid this bill
- found an ATM
- retrieved your balance

**Features and Benefits**

Fast

Convenient

Secure

Check your balance

Transfer money between Community Bank accounts

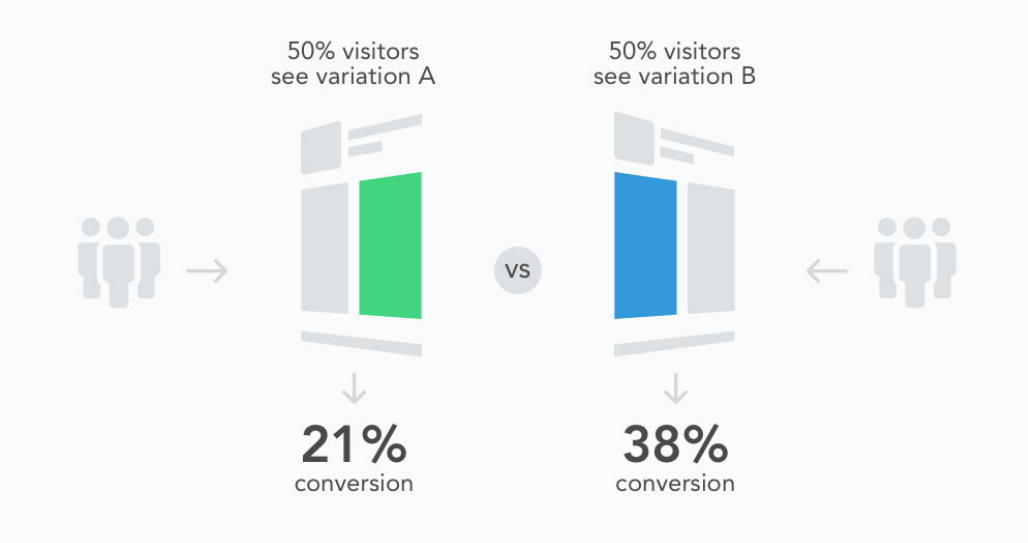
Pay bills / Send money

Find a nearby branch or ATM

Deposit checks

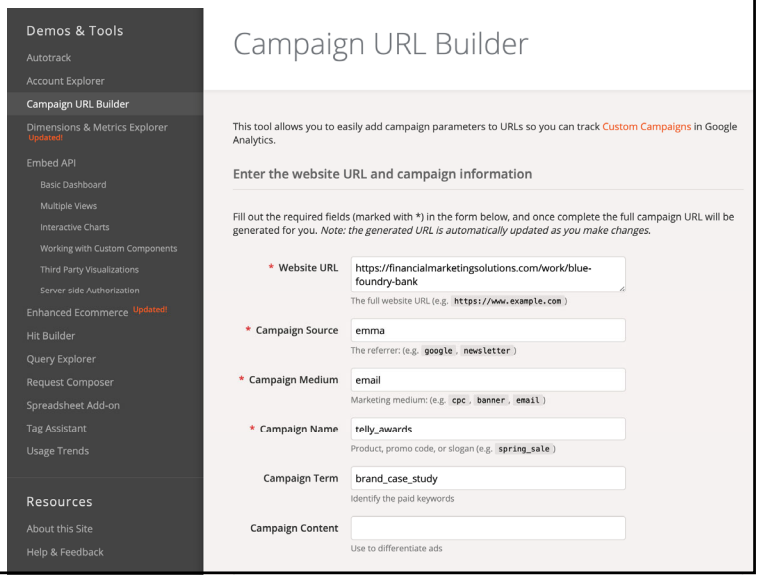


## Consider A/B or Multivariate Testing

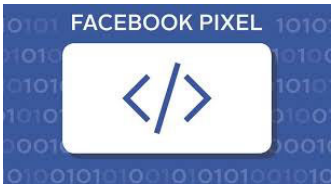


## Code URLs for Easier Tracking

https://financialmarketingsolutions.com/work/blue-foundry-bank?utm_source=emma&utm_medium=email&utm_campaign=telly_awards&utm_term=brand_case_study




## Implement Pixels / Tracking Codes




You can use the pixel to:

- **Make sure your ads are shown to the right people.** Find new customers, or people who have visited a specific page or taken a desired action on your website.
- **Drive more sales.** Set up automatic bidding to reach people who are more likely to take an action you care about, like making a purchase.
- **Measure the results of your ads.** Better understand the impact of your ads by measuring what happened as a direct result.

**Implementation**

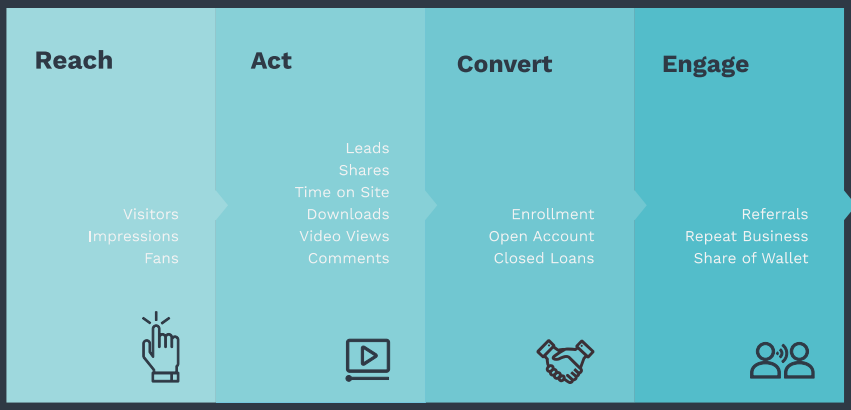
Be the customer. Test. Would you buy?

**Measurement**

## Know What You're Reporting on … and WHY

- Limit your parameters.
- Know your audience and objectives.
- Measure against your S.M.A.R.T goals and predefined KPIs so that you can clearly understand what success means to you beforehand.
- Know where your data is coming from.
- Have a set schedule/routine.
- Monitor activity regularly/don't wait until the very end.
- Utilize tools to help streamline efforts.
- Discuss real-time results internally with other team members.

## R.A.C.E Model to Help Map Customer Journey



## Tactical Implementation of R.A.C.E

**Mortgage Campaign**

| | What mediums will be used? | What are the success metrics? | What are the goals / metrics? | Responsible Party for reporting | Actual Numbers | Comparative Analysis |
|---|---|---|---|---|---|---|
| Reach | TV | GRPs | 600/month | Agency | | |
| | Online Display Ads | Clicks | 125/month | Agency | | |
| | Search | Clicks | 75/month | Agency | | |
| | Radio | Frequency | 12/month | Agency | | |
| | Billboard | DECs | 550,000 | Agency | | |
| | Social Media Ads | Clicks | 125/month | Agency | | |
| | | | | | | |
| | **What actions could the audience take?** | **What are the success metrics?** | **What are the goals / metrics?** | **Responsible Party for reporting** | **Actual Numbers** | **Comparative Analysis** |
| Act | Visit the promotional landing page for first-time homebuyers | Complete pre qualification form | 1,000 | Bank ABC's Marketing Team | | |
| | Visit any page within the mortgage section | Time on site | < 2 minutes | Agency | | |
| | Visit the mortgage team page | Click on specific email address | 15 | Agency | | |
| | Watch the "What exactly is Escrow" video | Video views of 10 seconds or more | 500 | Agency | | |
| | Download the checklist for first-time homebuyers | Download | 125 | Agency | | |
| | Request to be contacted via the general contact form | Form inquiry | 10 | Bank ABC's Marketing Team | | |
| | | | | | | |
| | **How will the audience convert?** | **What are the success metrics?** | **What are the goals / metrics?** | **Responsible Party for reporting** | **Actual Numbers** | **Comparative Analysis** |
| Convert | Fill out online mortgage application | Completed applications | 100 | Bank ABC's Mortgage Department | | |
| | | | | | | |
| | **How will we keep the audience engaged?** | **What are the success metrics?** | **What are the goals / metrics?** | **Responsible Party for reporting** | **Actual Numbers** | **Comparative Analysis** |
| Engage | Direct Mail | Website visits via vanity URL | 500 | Bank ABC's Marketing Team | | |
| | Email | Clicks | 50 | Agency | | |
| | Social Media | Comments | < 25 | Agency | | |
| | Lunch and Learn Events | Attendance | 40 people | Bank ABC's Marketing Team | | |
| | | | | | | |

## Implement Post Buys _ Print

May 3, 2020

| Circulation | Circulation Overall |
|---|---|
| 31,319 | 62,638 |
| 27,404 | 27,404 |
| 10,000 | 20,000 |
| 2,000 | 2,000 |
| **70,723** | **112,042** |

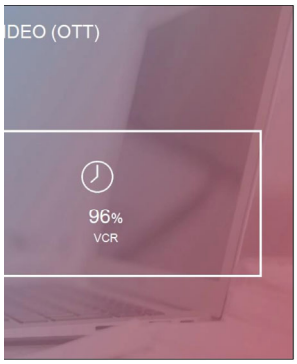
## Implement Post Buys _ TV / OTT / Radio

TV Sioux Falls

**Spots Placed March - June**

| Station | Program | Total Spots Booked | Total Spots Placed |
|---|---|---|---|
| KDLT | News @ 5p | 14 | 14 |
| KDLT | Today Show | 6 | 6 |
| KDLT | Indy 500 | 1 | 1 |
| KDLT | PGA Golf | 5 | 5 |
| KDLT | Dateline | 4 | 4 |
| KDLT | News @ 6:30a | 20 | 20 |
| KELO | KELOLAND This Morning | 24 | 24 |
| KELO | KELOLAND News @ 5p | 6 | 6 |
| KELO | KELOLAND News @ 4:30a | 12 | 12 |
| KELO | KELOLAND Weekend News | 1 | 1 |
| KELO | KELOLAND News @ 6a | 14 | 14 |
| KELO | KELOLAND News @ 10p | 4 | 4 |
| KELO | KELOLAND Living (Bonus) | 1 | 1 |
| KELO | KELOLAND News (Bonus) | 1 | 1 |
| KELO | KELOLAND News Midday | 2 | 2 |
| KSFY | Nightline | 12 | 12 |
| KSFY | News @ 10p | 1 | 1 |
| KSFY | US Farm Report | 12 | 12 |
| KSFY | News @ 5:30p | 12 | 12 |
| KSFY | ABC News Special | 1 | 1 |
| KSFY | Ellen | 4 | 4 |
| KSFY | News @ 6p | 7 | 7 |
| KSFY | American Idol | 1 | 1 |
| KSFY | Shark Tank | 6 | 6 |
| KSFY | News @ 5a | 3 | 3 |

Intro Branding (:60) Spot ran 100%
Total Spots Booked: 174
Total Spots Placed: 174
Total GRPs HH for March through June: 847.6
Total GRPs Adults 25-54 for March through June: 780.6
Total GRIMPs Adults 25-54 for March through June: 1,110,344



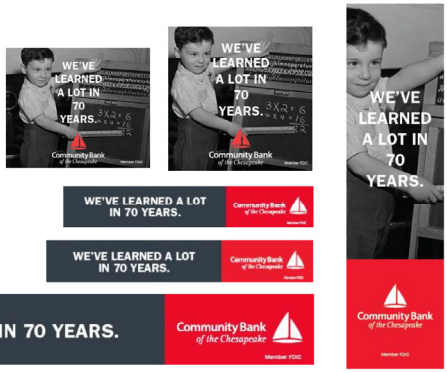

## Implement Post Buys _ PPC

| Campaign | Clicks | Impressions | CTR | Avg. CPC | Impression Share |
|---|---|---|---|---|---|
| Branding | 659 | 2,292 | 28.75% | $0.27 | 45.62% |
| Consumer Lending | 112 | 3,689 | 3.04% | $1.35 | 10.93% |
| Private Client Group | 17 | 453 | 3.75% | $8.01 | 41.00% |
| **Total** | **788** | **6,434** | **12.25%** | **$0.59** | **15.05%** |

## Implement Post Buys _ Online Display

Programmatic I May

**Anniversary**
Total Impressions: 74,653
CTR: 0.229%
Total Clicks: 171



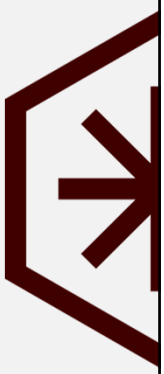
## Helpful Formulas

- CTR = (Number of clicks / Number of views) X 100
- CPM = (Cost to an Advertiser / Impression ) X 1000
- CPC = Cost to an Advertiser / Number of clicks
- CR = (Number of Conversions / Number of Clicks ) X 100
- CPL = Cost to the Advertiser / Number of Leads generated from the ad
- ROI = (Current Value of Investment - Cost of Investment) / Cost of Investment X 100

## "Vanity" Metrics

- Likes
- Views
- Downloads
- Reactions
- Comments
- Shares

Avoid using these in isolation.



## Most Common GA Metrics

**Users** - Visitors who have initiated one session with your website or app within a specified period of time.

**Sessions** - The period of time a user is active on your site or app.

**Pageviews** – An instance of a page being loaded (or reloaded) in a browser.

**Average Session Duration** – The average length of a session.

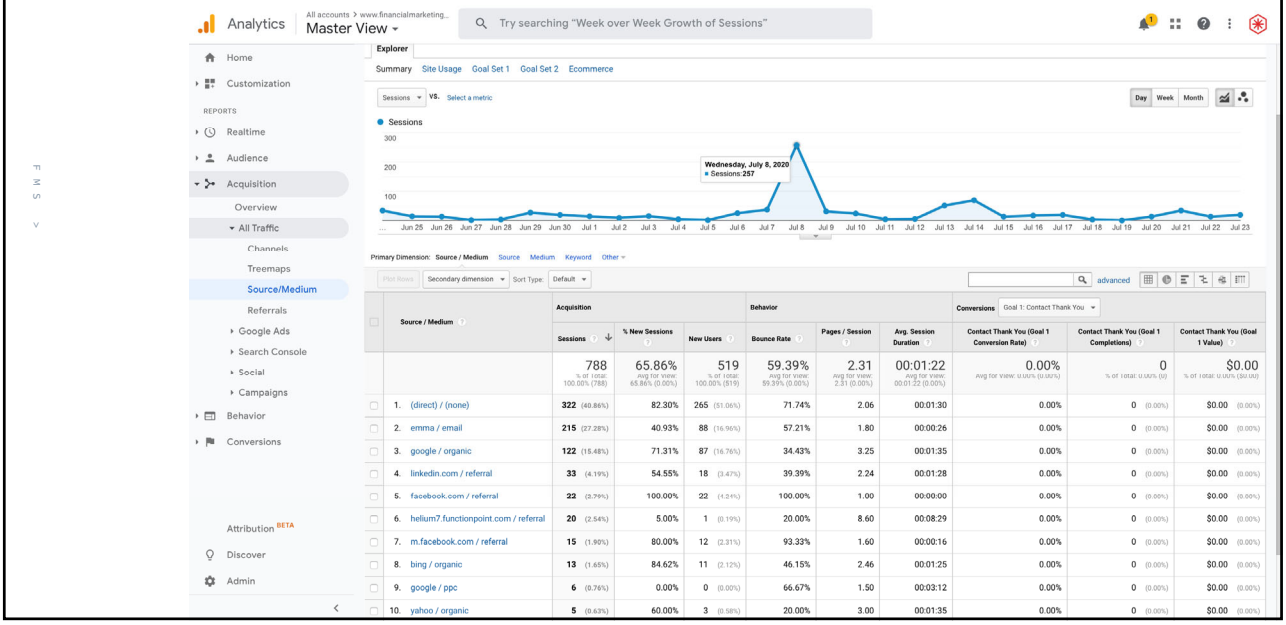
**Pages / Session** – The average number of pages viewed during a session. Repeated views of a single page a counted

**Bounce** - A 'bounce' happens when a user lands on a website page and exits without visiting another page.

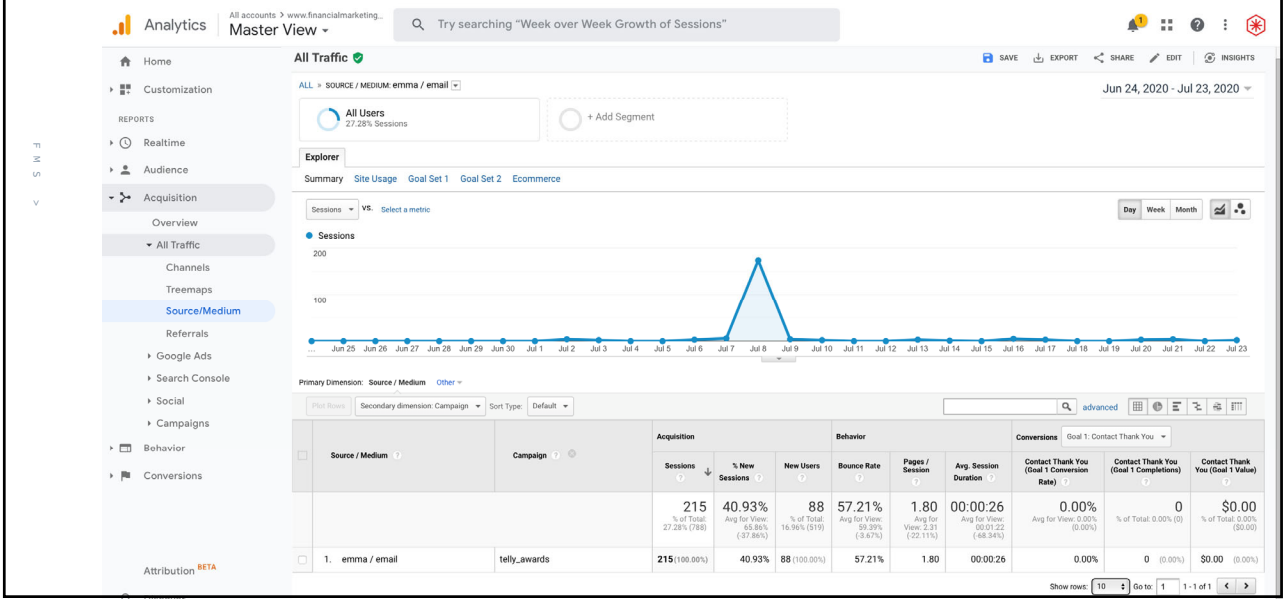
**Event** – Event is a type of hit used to track simple user interactions with content. Examples of user interaction commonly tracked with Events include downloads and video plays.

**Goal** - A configuration setting that allows you to track the valuable actions, or conversions, that happen on your site or mobile app.

## GA > Acquisition > All Traffic > Source/Medium

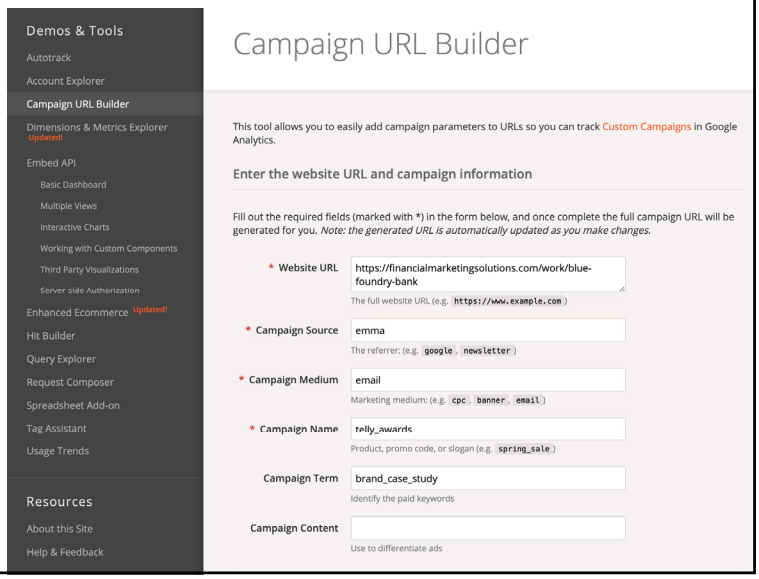



## GA > Acquisition > All Traffic > Source/Medium > Campaign

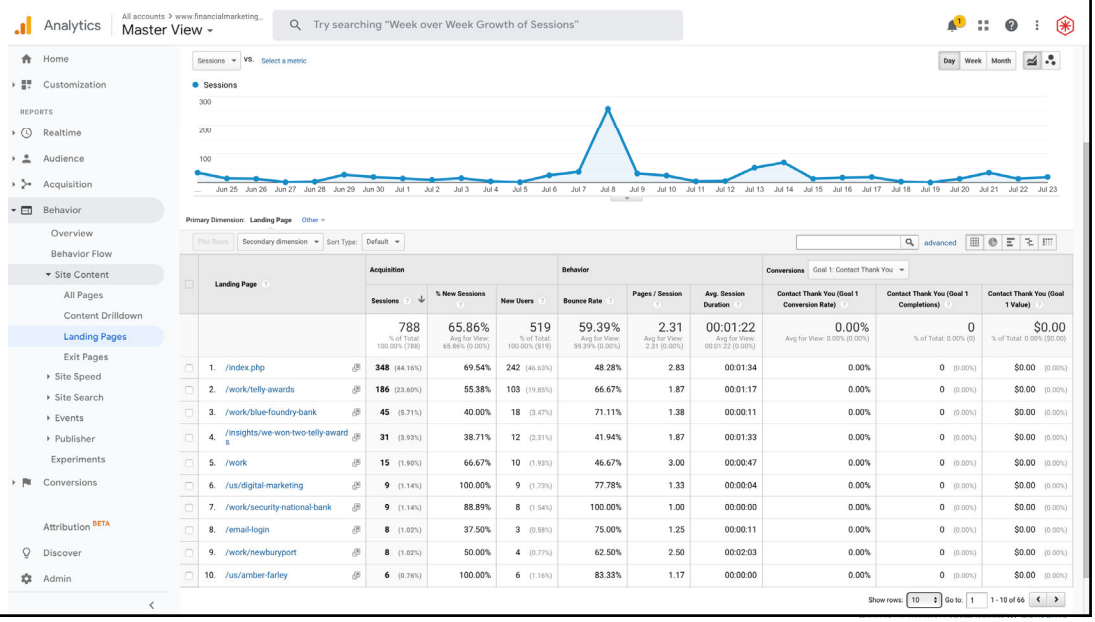


## Google URL Builder

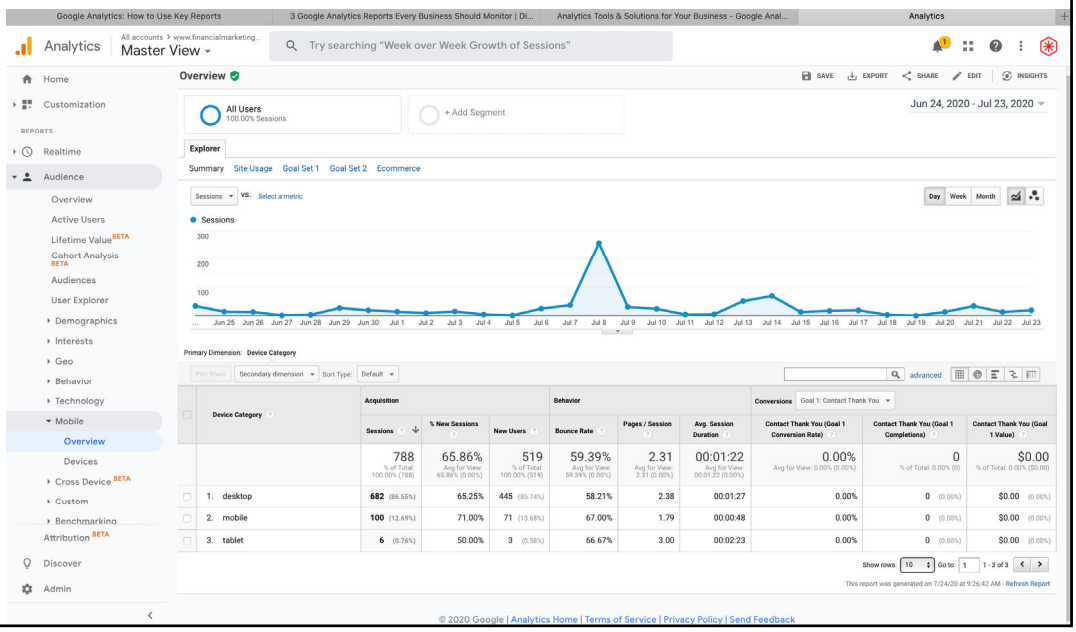
https://financialmarketingsolutions.com/work/blue-foundry-bank?utm_source=emma&utm_medium=email&utm_campaign=telly_awards&utm_term=brand_case_study




## GA > Behavior > Site Content > Landing Pages



## GA > Audience > Mobile > Overview

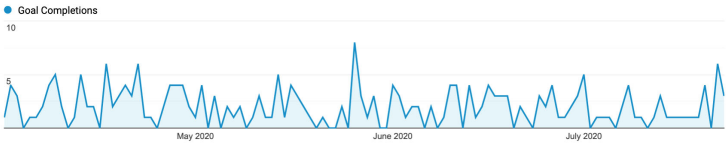



## GA > Site Search

Overview

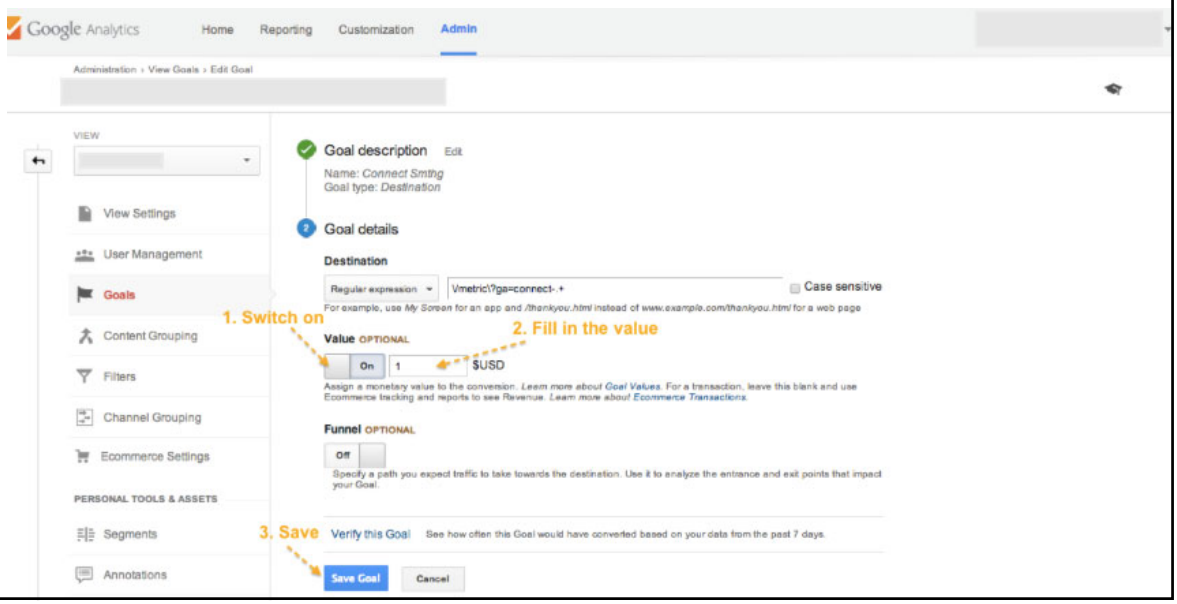
| | Search Term | Total Unique Searches | % Total Unique Searches |
|---|---|---|---|
| 1. | routing number | 40 | 4.31% |
| 2. | estatements | 33 | 3.56% |
| 3. | locations | 31 | 3.34% |
| 4. | careers | 18 | 1.94% |
| 5. | hsa | 15 | 1.62% |
| 6. | location | 15 | 1.62% |
| 7. | rates | 13 | 1.40% |
| 8. | line of credit | 11 | 1.19% |
| 9. | e statements | 10 | 1.08% |
| 10. | hours | 10 | 1.08% |

## GA > Conversions > Goals




| | Goal Completion Location | Goal Completions | % Goal Completions |
|---|---|---|---|
| 1. | /business-checking-account-comparison.aspx | 87 | 37.99% |
| 2. | /business-mobile-banking.aspx | 43 | 18.78% |
| 3. | /apply-for-a-home-loan.aspx | 37 | 16.16% |
| 4. | /scorecard-rewards.aspx | 29 | 12.66% |
| 5. | /credit-cards.aspx | 11 | 4.80% |
| 6. | /speedbump.aspx?link=https://complianceoneonlineapp.wolterskluwerfs.com/?id1=20164&id2=deac7349-2f0e-45d5-9e34-9f016138c3ef | 9 | 3.93% |
| 7. | /speedbump.aspx?link=https://itunes.apple.com/us/app/cb-s-bank-business-mobile/id1234704420?mt=8 | 4 | 1.75% |
| 8. | /speedbump.aspx?link=https://play.google.com/store/apps/details?id=com.cbsbank.biz&hl=en | 4 | 1.75% |
| 9. | /speedbump.aspx?link=https://itunes.apple.com/us/app/cb-s-bank-business-mobile-banking/id1234704420?mt=8 | 2 | 0.87% |
| 10. | (entrance) | 1 | 0.44% |

## Monetizing Your Conversions



## Conversion Paths

### TOP CONVERSION PATHS

| | | |
|---|---|---|
| 1. | Paid Search | 47 (52.81%) |
| 2. | Organic Search | 13 (14.61%) |
| 3. | Paid Search > Direct | 7 (7.87%) |
| 4. | Direct | 3 (3.37%) |
| 5. | Direct × 2 | 3 (3.37%) |
| 6. | Referral > Direct × 2 | 2 (2.25%) |
| 7. | Organic Search > Direct × 2 | 2 (2.25%) |
| 8. | Paid Search > Organic Search | 1 (1.12%) |
| 9. | Direct × 3 | 1 (1.12%) |
| 10. | Direct × 4 | 1 (1.12%) |

## Building Audiences

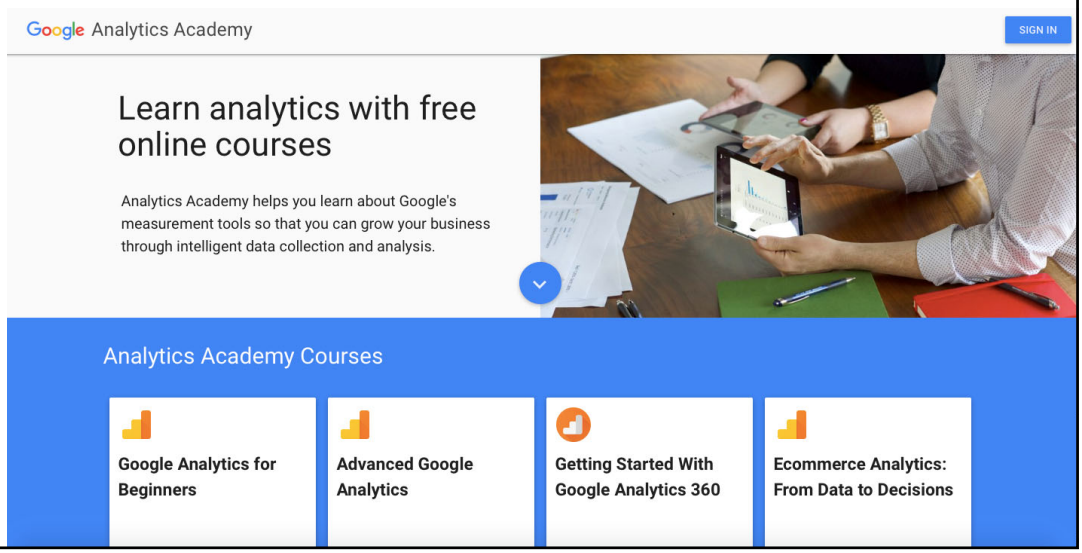
### Audiences

Create audiences to engage with your users through Google's Audience marketing integrations, like Remarketing Lists for Search Ads and Remarketing on the Google Display Network, or with users who return to your site with Google Optimize 360. Learn More

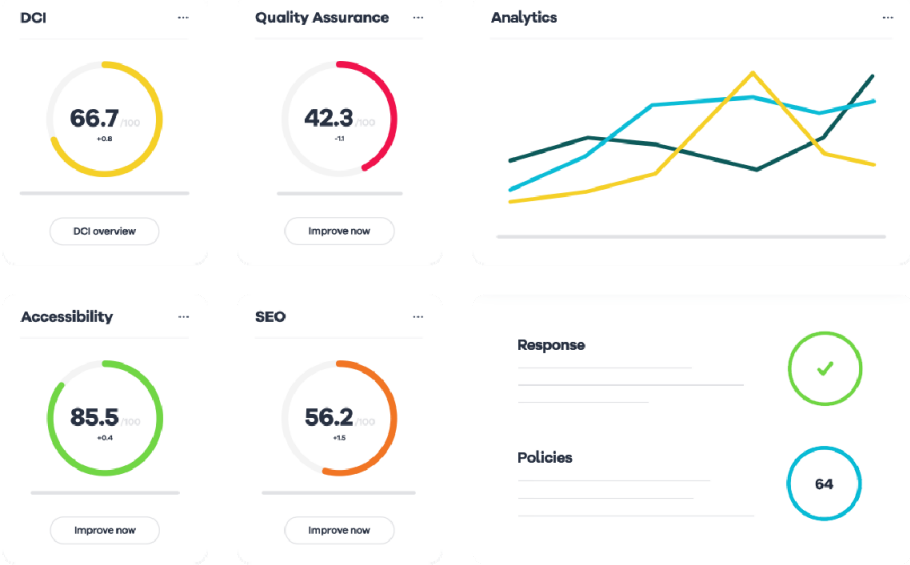
+ NEW AUDIENCE | Import from Gallery | Status: All | Open | Search

| Name | Description | Date created | Last modified | Membership | Type |
|---|---|---|---|---|---|
| All Users | All Users | Jul 11, 2017 | Jul 11, 2017 | Open | AdWords |
| Home Building Retargeting | Page: contains "/mortgage/new-construction/renovation" | Aug 25, 2017 | Apr 2, 2018 | Open | AdWords, Analytics |
| Home Buying Retargeting | Page: contains "/mortgage" Page: contains "/new-construction/renovation" | Aug 28, 2017 | Apr 2, 2018 | Open | AdWords, Analytics |
| Personal Insurance Retargeting | Page: contains "/personal/insurance" Page: contains "/insurance-quote" Page: contains "/meet-our-agents" | Mar 23, 2018 | Mar 23, 2018 | Open | AdWords, Analytics |
| Returning Users | User Type: "Returning Visitor" | Jan 2, 2018 | Jan 2, 2018 | Open | AdWords, Analytics |
| Wealth Management Retargeting | Page: contains "/personal/wealth-management" Page: contains "/personal/products-and-services" Page: contains "/personal/education-and-tools" Page: contains "/personal/meet-the-team" Page: contains "/calculator/roth-ira" Page: contains "/calculator/roth-tr | Mar 12, 2018 | Mar 12, 2018 | Open | AdWords, Analytics |

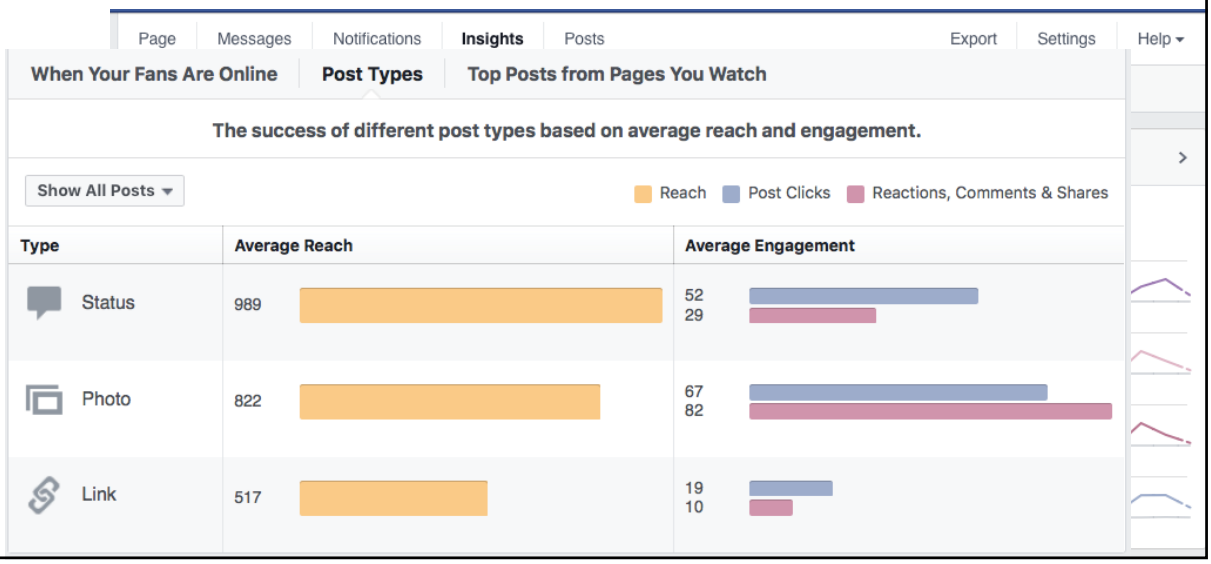
## Analytics Academy




## Regularly Audit Website for Errors



## Identify Social Content That Works For You




## ROI Example Using "Benefits"

**Campaign:** First-Time Home Buyer Promotion Ad

**Goal:** Leads *(people who filled out landing page form to get the bank's handy checklist)*

**What is the monetary value per lead?** $50 *(data you gathered from mortgage team – average profit from a RE loan is $2,000. 1 in 40 leads becomes a mortgage customer. $2,000 / 40 = $50)*

**How many leads did you get per channel?** Facebook – 100; GDN – 50; AdWords – 200; LinkedIn – 10.

| Social Channel | Benefit (value X # of leads) | Ad Spend: | ROI |
|---|---|---|---|
| Facebook | $5,000 | $1,000 | 400% |
| Google Display | $2,500 | $1,000 | 150% |
| AdWords | $10,000 | $1,000 | 900% |
| LinkedIn | $500 | $1,000 | -50% |

$$\frac{\text{(Revenue [benefit*] – Costs)}}{\text{Costs}} \times 100$$

*In this case our revenue is based on the value of our goals established for each individual social campaign.

## Group Discussion

## Next Steps

## Workshop Agenda

~~Session 1:~~
~~Today's Marketplace~~
~~Understanding Brand~~

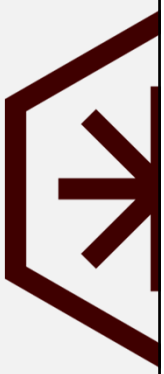
~~Session 2:~~
~~Strategy Development~~
~~Creative Messaging~~
~~Content Development~~

~~Session 3:~~
~~Delivery Channels~~
~~Owned Media~~
~~Paid Media~~

~~Session 4:~~
~~Earned Media~~
~~Implementation~~
~~Measurement~~

## Key Takeaways

1. Know and advance your bank's authentic brand.
2. Align marketing with the strategic goals of the bank.
3. Ignite and unite your team around your bank's brand before promoting it externally.
4. Know your audience.
5. Define what success looks likes.
6. Make sure your creative is simple, memorable and appropriate.
7. Have a relative marketing budget.
8. Incorporate owned, paid and earned media into your marketing plan.
9. Make time to learn.
10. Test, measure, optimize, repeat.



## Use Tools to Help

Content Planning Tools
*(airtable, coschedule, asana)*

Social Publishing Tools
*(hootsuite, social assurance, sendible, buffer, later, sproutsocial)*

Social Listening Tools
*(brand 24, brand watch, youscan)*

Content Creation Tools
*(canva, wistia, grammerly)*

Social Advertising Tools
*(adespresso, ad stage)*

Social Selling Tools
*(gremln, sales navigator )*

Social Analytics Tools
*(sprout social, social assurance, snaplytics)*

## Go-To Resources

| | |
|---|---|
| Google Thinks | Digiday |
| Social Media Today | Digital Trends |
| Social Media Examiner | Wired |
| Mashable | Huffington Post |
| HubSpot | Forbes |
| AdWeek | eMarketer |
| Search Engine Land | Marketing Land |

Thank You
Financial Marketing Solutions
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