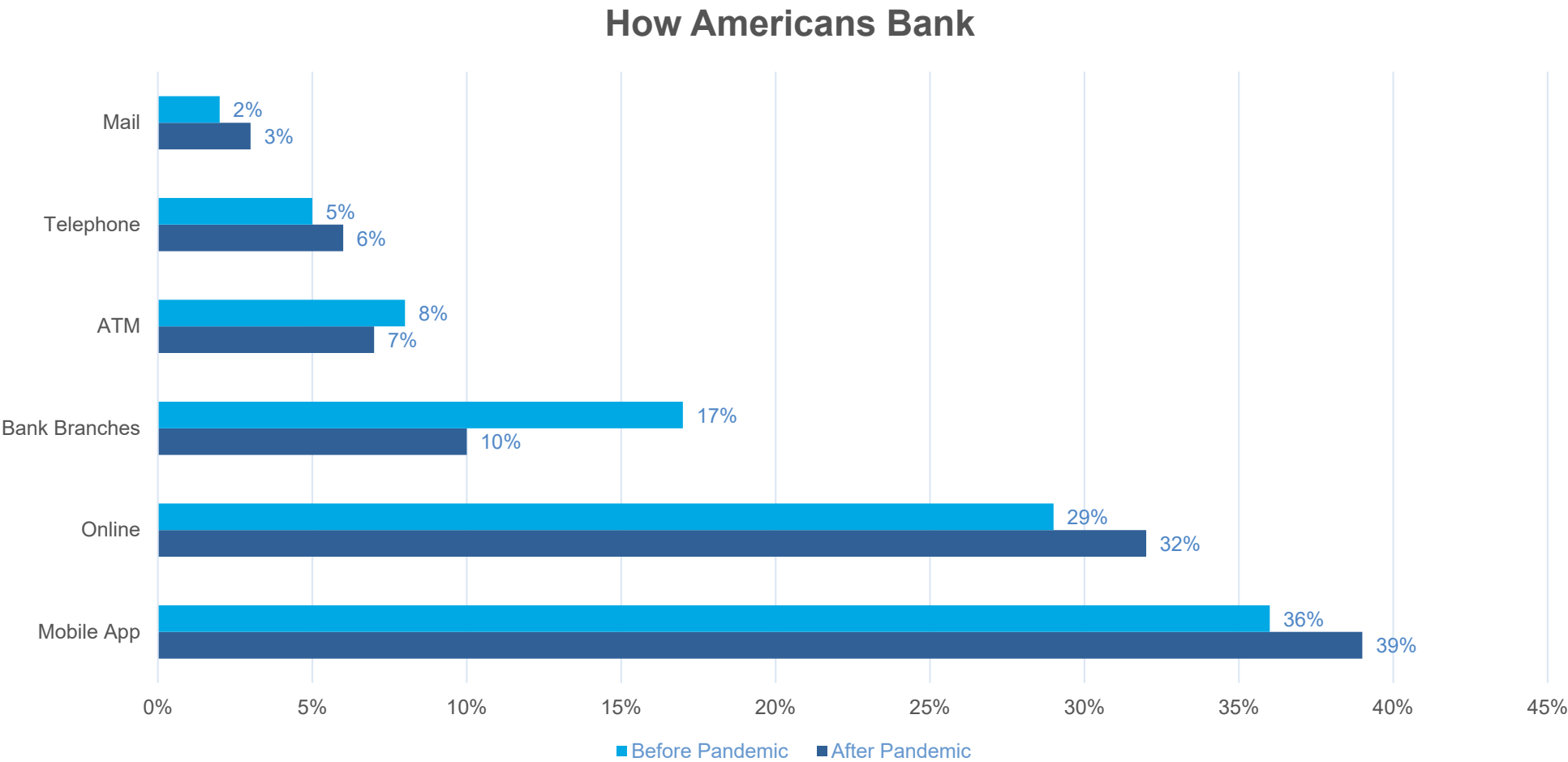


Marketing 2021

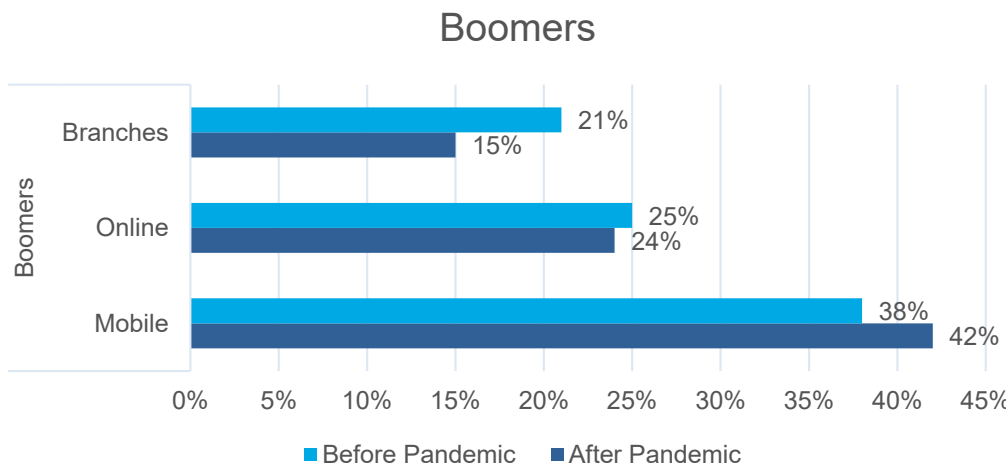
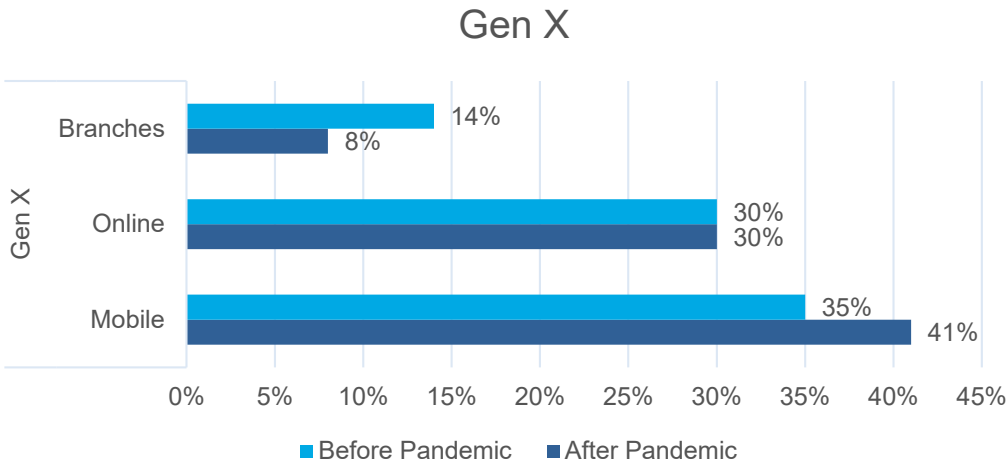
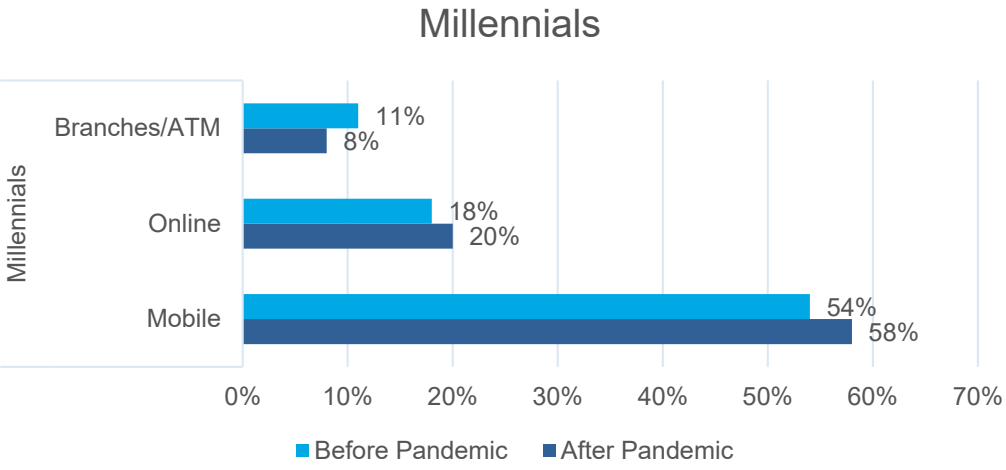
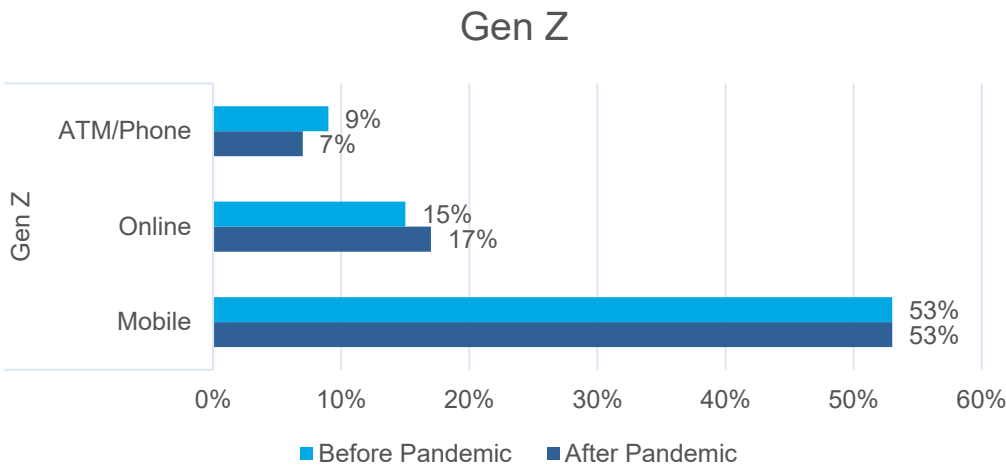
Denise Tognarina and Lacey Taplin

Where We Are Headed Towards “Omni Channel” Offerings



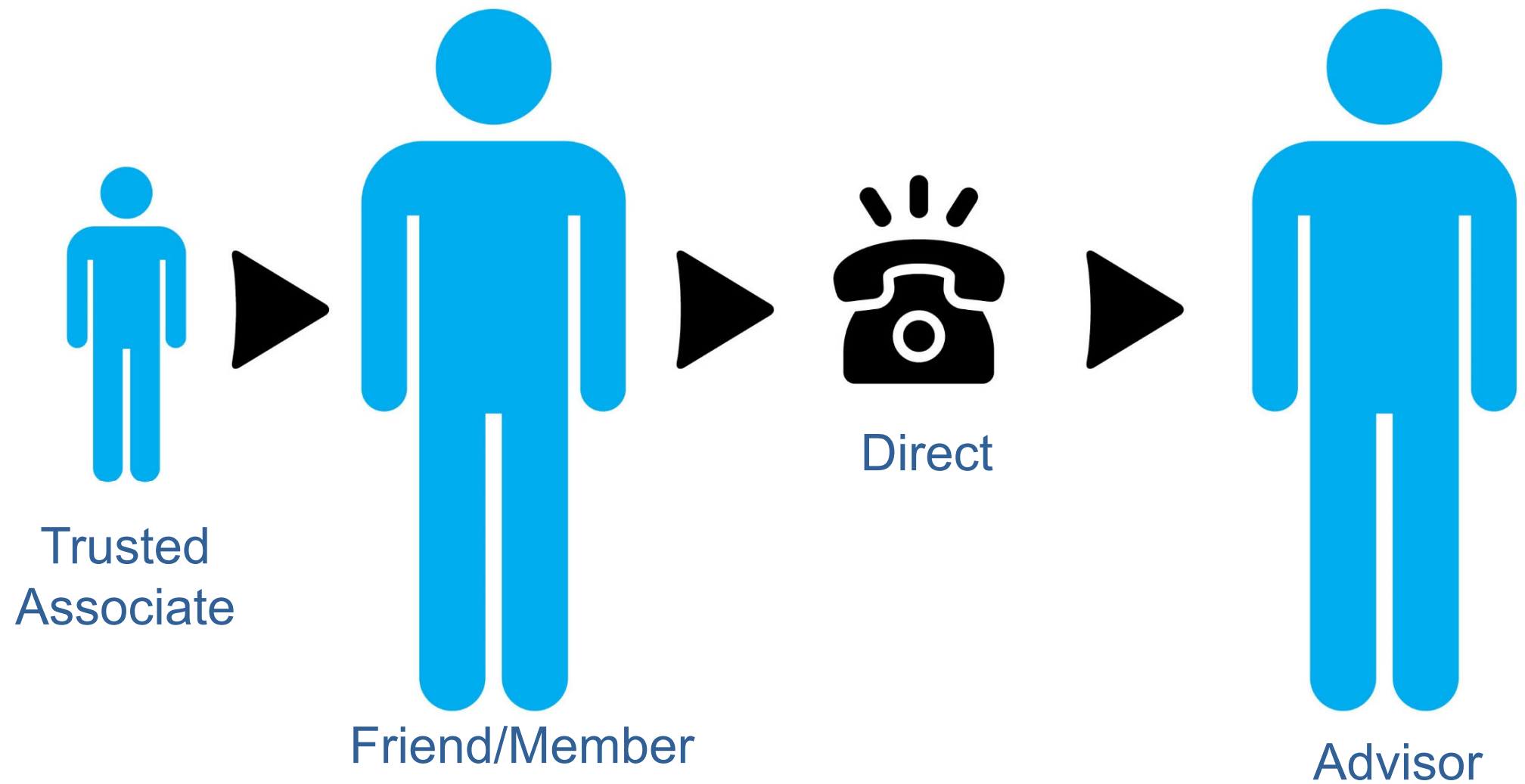
Source: <https://www.aba.com/news-research/research-analysis/preferred-banking-methods>

The Younger the Client, the More Mobile Focused

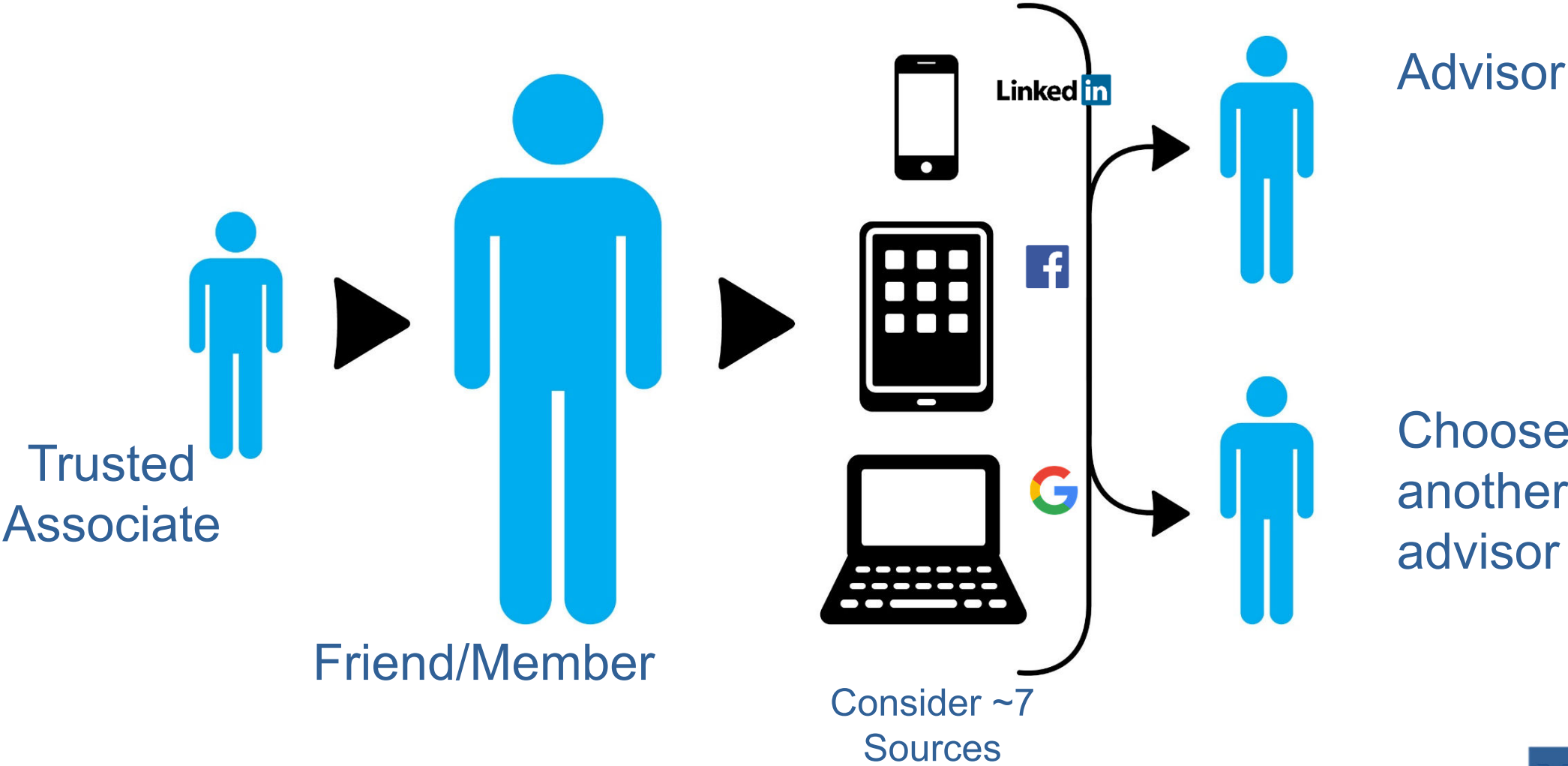


Source: <https://www.aba.com/news-research/research-analysis/preferred-banking-methods>

Yesterday's Referral Journey



Today's Referral Journey



Your Digital Footprint Is More Important Than Ever

- Includes all three levels of your brand:



Institution



Investment Program



Advisor

Source: <https://thefinancialbrand.com/66228/bank-credit-union-branch-traffic/>

Digital Marketing Best Practices

➤ Website

- All three brands clearly represented
 - **Bank**
 - **Investment Program**
 - **Advisors**
- Unique active blog
 - **Outbound push to create inbound traffic back to site**
 - **Email distribution, social syndication**
- Mobile-friendly design; user-friendly design (accessibility)
- Helpful links to valuable life-stage content
- Invite visitors to engage with you through strong, clickable calls-to-action; contact us on each page
- Monitor links (e.g., broken links chase investors away)



Warning

- Confusing corporate speak (personal banking vs. investment services vs. wealth management vs. trust services)

Digital Marketing Best Practices

➤ Content

- Know your audience—create buyer personas for content mapping (content based on the buyer's journey)
- Share relevant information leadership through blogs, articles, and videos
- Financial content based on life events (common investor needs = Retirement Planning)
- Libraries of articles they can easily access
- Make content searchable (key words) inside and outside your site
- Consistent publishing: Design a content calendar to help you plan the information you share throughout the year



Warning

- Avoid quantity over quality content
- Leverage images/video
- Don't be too technical (YouTube not Hollywood)
- Personalize when possible (show team's personality and customize)

Digital Marketing Best Practices

➤ Email

- Apple's recent Mail Privacy Protection policy—affects all email marketing platforms, but doesn't change best practices
- Strategic communications help you share content and point of view
- Email engagement helps build a 1-on-1 relationship
- Keep emails short – a single idea
 - **“Snack Bite” dialogue with links back to website**
 - **No Scroll is Good Goal (depends on topic)**
- Include a specific call-to-action
- Make personal (greeting and closing)
- Segment and target lists to be more effective



Warning

- Break up dense, text-heavy content with imagery and videos

Digital Marketing Best Practices

➤ Social

- Investment Program has their own social media handles & profiles
- Have institution amplify the program's voice (tag institution)
- Each advisor has their own social media profiles
- Keep social media messaging consistent
- Reflect a unique channel voice. Strive for simplicity & relevancy



Warning

- Don't be afraid to show team's personality
- Beware of inconsistent posting activity
- Single social handles for a financial institution can get very noisy and confusing for subscriber (consider why the investor would want to subscribe)

Digital Marketing Best Practices

➤ Marketing Point Person

- Appoint institution employee to own and drive your progress
- Person should sit with the institution's marketing team and be assigned to the investment program
- Manages traditional and digital marketing plans
- Person should have the confidence to leverage resources and content – AND have the permission to employ digital marketing media



Warning

- Not having an agreed upon plan regarding content management (style, media, and frequency)