

# Drive growth and make an impact with Personas, Programs and Promotions

2018 IBA Marketing Conference

April 27, 2018

**idea**agency®

## PERSONAS

The underpinnings of any successful marketing effort is knowing who you're talking to and what motivates them. In the first part of the workshop, we will identify your priority persona, the type of customer you want more of. We will get in their head and walk in their shoes. You will walk away with a persona and a customer journey map that will help you target your best audience with the right message, in the right place and at the right time.

## PROGRAMS

Many financial institutions make their money from loan growth – so how can you increase your outreach to get more qualified leads into your sales funnel? During this section of the workshop, we will work to map out touch points and a content plan to engage with your best prospects. Best of all, we will learn how to incorporate the useful metrics into your program, so you can prove your return on investment.

## PROMOTIONS

Most financial institutions are selling the same products and services. While rates may change, by and large, you can get what you need from most banks or credit unions. For the last part of the workshop, we will review some great examples of unique promotions that got big results – and we'll put our creative hats on to come up with some out-of-the box promotions for an existing or new product or service that will create the results you are looking for.

# Meet your presenter



**Christine Tieri**, President, and the only Certified Brand Strategist in New England, works with businesses, brands and individuals to facilitate amazing transformations never before imagined.

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## ELEVATE YOUR BRAND WITH A CERTIFIED BRAND STRATEGIST

As professional advisors and consultants, Certified Brand Strategists offer the benefit of advanced training and thinking, plus a proven proprietary brand development process that builds brands and business value. After all, your brand is your most important asset. We talk and understand C-suite issues and think operationally, strategically and holistically about your business. We create tactics, programs and initiatives that consistently and constantly drive your brand, and your business, forward. Certified Brand Strategists complete Master's Level learning and are required to participate in continuous learning throughout the year.

Certified by:



**Idea Agency** employs the dual strategy of building bold brands that command long-lasting attention, and creating high-performance marketing activities that drive results. We live to uncover the uniqueness in businesses, brands and people to transform what is ordinary into extraordinary. Led by the only Certified Brand Strategist in New England, our team is passionate about doing incredible work alongside clients who are committed to taking their businesses to the next level. We have mastered our proprietary processes to ensure both short- and long-term results. And we promise, above all, to embrace client business as if it were our own. Only Idea Agency is ferociously committed to transforming our clients' businesses through the power of brand building and performance marketing.

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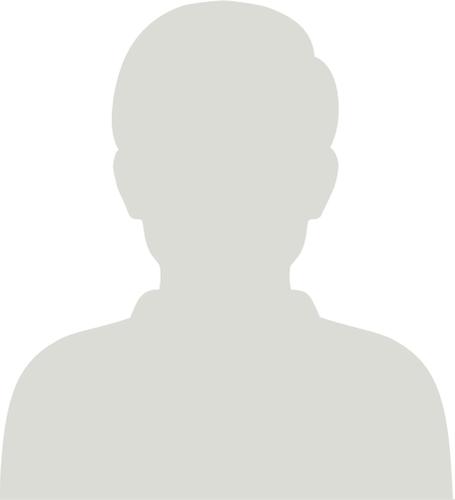
[info@ideaagency.biz](mailto:info@ideaagency.biz)

# DETAILED PERSONA

Age:	Highest edu:	Location:	Family status:
<p><b>Job:</b></p> <p>Title</p> <p>Salary range</p> <p>Skill set</p> <p>How long at job</p> <p>How long in position</p> <p>Intention to move</p>	<p><b>Typical day:</b> (Family/relationships, recreation, obligations, hobbies)</p>	<p><b>Value most:</b> (Status, money, trust, family, time, etc.)</p>	<p><b>Biggest worries:</b> (Status, money, trust, family, time, etc.)</p>
<p><b>Goals:</b></p> <p>Related to career, industry, company</p> <p>What does personal success look like?</p> <p>Family/relationship</p>	<p><b>Influencers &amp; information:</b></p> <p>Who</p> <p>What</p> <p>Where do they get info:</p> <ul style="list-style-type: none"> <li>Offline</li> <li>Online</li> </ul> <p>Social networks</p> <p>Political affiliation</p>	<p><b>Biggest differentiators:</b> What separates this persona from the rest of the population?</p>	<p><b>Game changing solution you can offer:</b></p>



# PERSONA AT-A-GLANCE

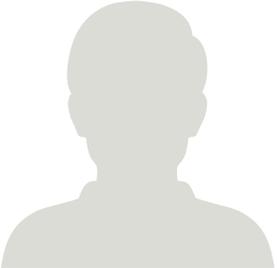
Name:	Age:	Segment:	
	<p><b>Who they are in a nutshell:</b> (2 sentence summary)</p>	<p><b>What are their goals:</b></p>	<p><b>What are their pain points:</b></p>
<p><b>Where do they find their info:</b></p>	<p><b>Why they should like you:</b></p> <ol style="list-style-type: none"><li>1.</li><li>2.</li><li>3.</li></ol>	<p><b>Why they might not like you:</b></p> <ol style="list-style-type: none"><li>1.</li><li>2.</li><li>3.</li></ol>	<p><b>What they are really buying:</b></p>



# DETAILED CUSTOMER JOURNEY

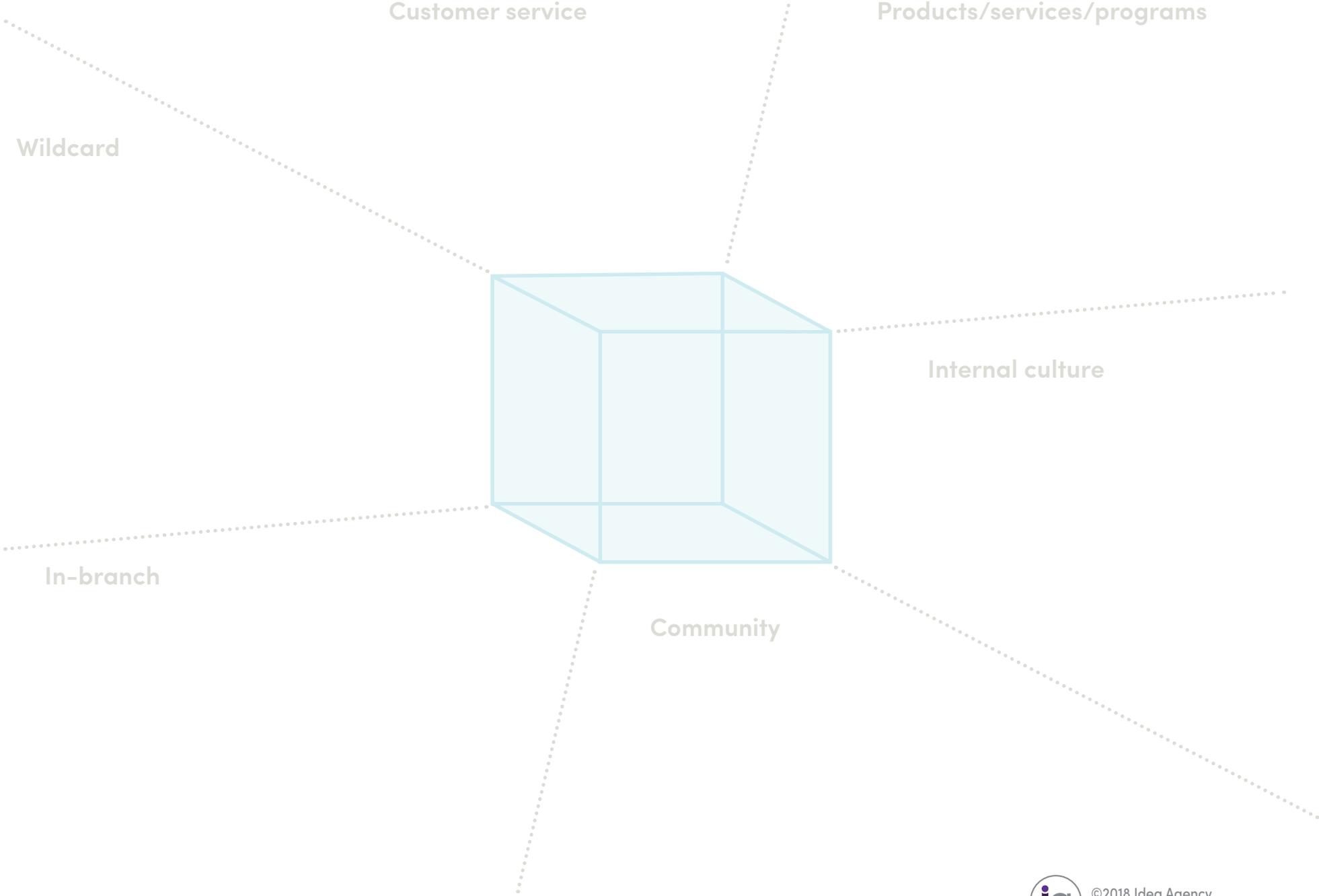
	<b>Product/Service:</b>  <b>Goal:</b>					
<b>PERSONA</b>	<b>TRIGGER</b>	<b>AWARENESS</b>	<b>CONSIDERATION</b>	<b>DECISION</b>	<b>DELIVERY/USE</b>	<b>ADVOCACY</b>
Story	What happened	What they start to do	How they are digging in	What tipped final decision	First impressions	What will they tell friends
Customer goals						
Touchpoints	Fill out 3-5 touchpoints for each stage.	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.	1. 2. 3.
Takeaway	Fill out how the customer will feel at each stage.	I feel _____ _____ _____ _____				
Business goal						
KPI						
Ownership						
Ideas & improvement						

# CUSTOMER JOURNEY AT-A-GLANCE

 <b>PERSONA</b> Story Brand promise Product/service Benefits	<b>TRIGGER</b>	<b>AWARENESS</b>	<b>CONSIDERATION</b> <b>DECISION</b>
	Trigger	Awareness	
	Consideration	Decision	
	Delivery/Use	Advocacy	
	<b>ADVOCACY</b>	<b>DELIVERY/USE</b>	



# THINK OUTSIDE THE BOX



..... **RIGHT AWAY** .....

**Actionable ideas**

..... **BIG IDEA** .....

Make it Real: Name your initiative

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How it ties in with overarching brand:

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Why customers will love:

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Why your organization will love:

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Steps to make it happen:

Responsible party

1.	
2.	
3.	
4.	
5.	

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