

# MARQUIS

## 2019 Marquis User's Conference Marketing Takeaways

### DAY 1

#### **Andrew Lampkins and Amy McConnell - Six Relevant Data Sources to Create Better Connections**

- Data is the most valuable asset on earth as it surpassed oil in value.
- Utilize six data sources (Demographics, P\$ycle, Propensity, Mapping, FICO Score, and Credit Monitoring) to tell a story and personalize the experience.
- Use the key aspects learned from the data sources to build a filter for existing or prospecting programs.
- Remember how the case study used important data sources, new segments, and created lifelong customers.
- Make your programs compelling, personalized, optimized, and seamless.

#### **Kristine Ziccardi and Mike Bryant - Four Segmentation Models for Increased Sales, Deeper Relationships and Stronger Retention**

- Leverage available data sources to identify which variables best select your target audience. (Assemble)
- Keep things simple, group those data sources into segments to simplify your tactical options. (Analyze)
- Leverage automation and repeatable processes to act on the segments identified, creating more granular options based on member/customer personalization (channel preference, product preference, tailored offers, etc.) (Act)

#### **Jeanine Perrone and Christopher Ruscher - Prospecting: Intelligent Farming Strategies**

- When using location-based marketing, don't rely on geography alone. Use your data and an understanding of your customers to create your strategy: telling your story to customers and prospects in order to engage them and enhance their journey with you.
- The decision between SEO and SEM is really not either/or....it is a combination of both. SEO is much more cost-effective and important to your long-term strategy than SEM. However, SEM will bring more immediate and targeted results.
- WebTrax monitors those who visit specific pages on your website and allows you to send timely and personalized communications based on click behavior. For example, send Auto Loan emails to people who visit the Auto Loan page on your website.
- Best Practices for Website Engagement: Simple Design, Easy to Navigate, Clear Call to Action, Use Images and Videos, must be Responsive for Mobile Viewing, Test and Seek User Feedback
- Automation can include one simple email or a full decision tree of emails and letters for each page on your website – and each one can use a different strategy.

- There is not one silver bullet in data-based marketing strategies. What is required is a comprehensive plan in a multi-channel environment telling a consistent, fine-tuned message to your audience in any means they choose to connect with you.

### **Jenna Rowland and Sue Schabert - Acquisition: How to Turn a Prospect into a Customer**

- Acquisition is a strategy, requiring a holistic approach to marketing and communication.
- Profiling is a key step in defining the parameters of the market you are targeting.
- Acquisition is a process, requiring longer term commitments to realize positive gains.
- Leverage all your communication channels.
- You can build credibility and brand awareness through your social platforms – don't pitch product.

## **DAY 2**

### **Tony Rizzo - Expanding Your Horizon, Consumer Trends from Outside Financial Services**

- There are three ways to grow your business: increase new customers, increase sales at the point-of-purchase, and increase the frequency of purchase.
- Customers select their next banking relationship based on lowest fees, local branch, and a recommendation from a friend or family member.
- The top three innovations to watch for and participate in are personalization, artificial intelligence, and chatbots.
- No matter the technology used, focus on personifying your company's values.

### **Maecey Castle and Ted Triplett - Get Onboard! Build a Behavior-based Onboarding Program to Increase Activation and Product Utilization**

- Acquiring and retaining new customers are two very different things.
- Look beyond product cross-sell; seek increased activation and activity.
- Successful onboarding requires multi-channel marketing.
- Onboarding reinforces the buying decision, deepens the customer relationship, and increases ROMI.
- While marketing ultimately owns the onboarding process, we don't have to go it alone.

### **Bob Shibla and Stacie Tindle - Increase Customer Engagement**

- Your data holds the key to successful and profitable campaigns.
- Your Balance Sheet tells a story and points you in a profitable direction.
- Value scoring, life stage and P\$ycle provide incredible insight.
- Utilizing various Marquis products allow for even deeper penetration and understanding.
- When we tie all of this together, we reach a more relevant and specific target audience for greater response and ROI.

### **Mike Bartoo and Jess Steckel - Customer Relationship Expansion**

- Understand the importance of expanding/deepening relationships with your clients.
- Understand where your clients are in their personal and financial life stage and tailor offers/communications to that insight.
- Pay attention to your clients and acknowledge behaviors, as this builds trust and credibility.
- Your Marquis partnership is a tool for you to use, the value lies in how well you use it.
- You're never done.

### **Joline Walgamott and Chris Jones - The Marquis Digital Suite**

- Surveys are a valuable resource for external voice of the consumer and internal employee insights & feedback. Many financial institutions pay thousands of dollars to generate and receive the level of valuable qualitative & quantitative data you get from the DocuMatix Product Suite.
- Event registration management is a valuable tool to maximize attendance and be leveraged in ways that help track ROIs for your financial education and other events.
- CommLink allows your front-line associates to keep their “finger on the pulse” of the marketing & communications that members/customers are receiving at all times.
- WebTrax turns your website into a data insights, trackable leads and opportunities generating source, as well as an automated marketing & communications powerhouse.
- Secure WebForms can be used both internally and externally. It is the most versatile of all the additional modules in the Digital Platform.
- eNewsletters and 95 editable Financial Articles: use these articles on your website and in your social media, not just in your eNewsletter.
- DOD Print: Don't have an email address for your member/customer? Print can be sent just as easily as any of your automated emails.
- DOD is “database neutral” meaning that a .CSV file can come from any database: Core Processor, ExecuTrax, Mortgage database, etc.
- Text Messaging: Whether you use the DocuMatix Platform for your text messaging or not, begin gathering opt-ins for both Marketing and Operational/Transactional text right away! At some future date, you WILL be adding this form of communication and this will put you ahead of the game.