



# The Informed Banker Future Readiness Series Part Two: Is Your Marketing Future Ready?

September 27, 2017

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# Presenters



**Sam Kilmer**  
Senior Director  
*Cornerstone Advisors*



*Moderator*  
**Christine Ahlgren**  
Payments Marketing  
Harland Clarke

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- SHOW BUSINESS
- NETWORK
- MUSIC
- CINEMA
- BUSINESS/FINANCE
- WORLD NEWS

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- INTERNET
- LIVE CHAT
- MEDIA
- PHOTOS
- VIDEOS
- MUSIC

# FOR TODAY'S DISCUSSION...

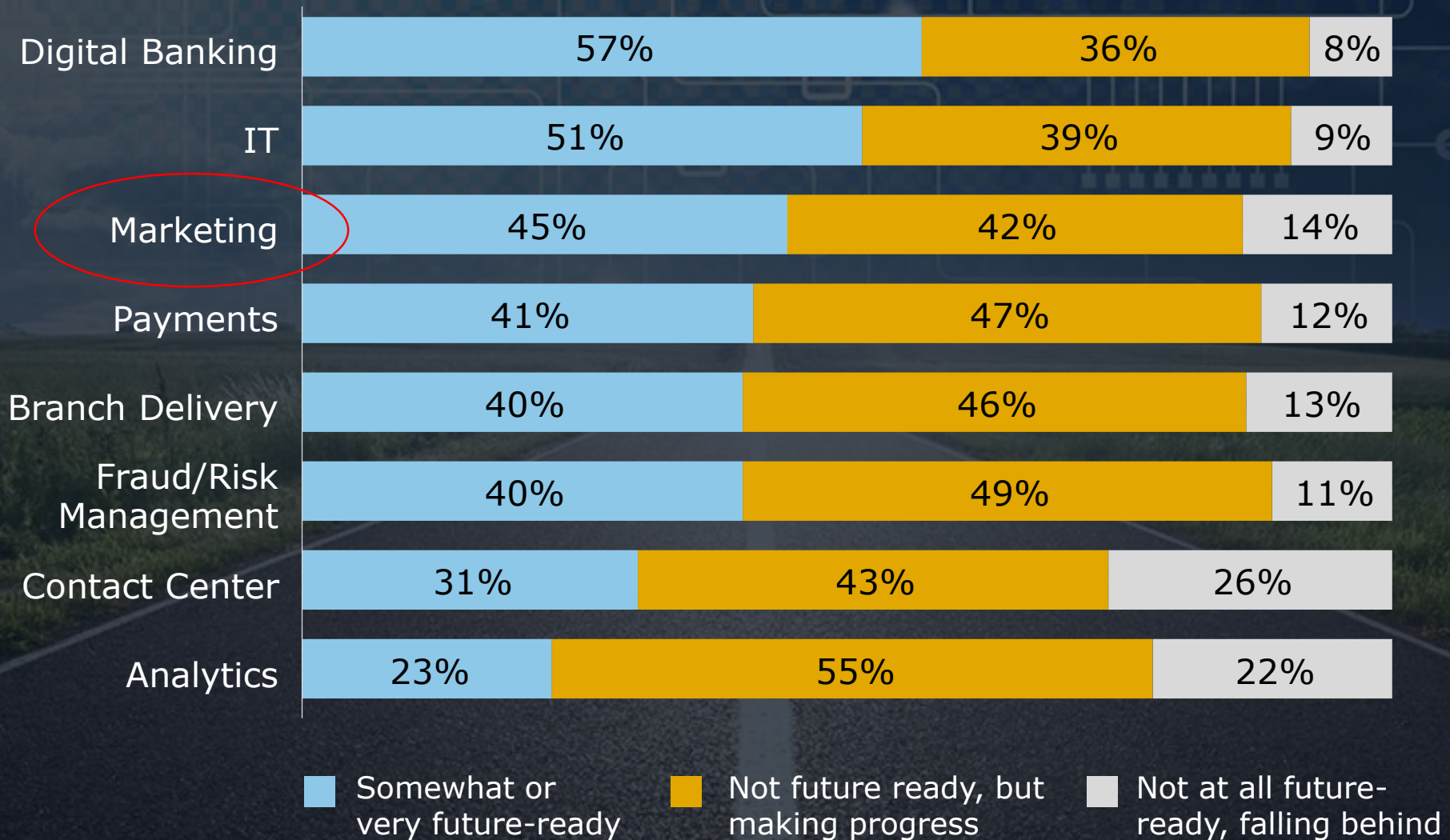
Where is Marketing most challenged ?

How do you assess Marketing future-readiness ?

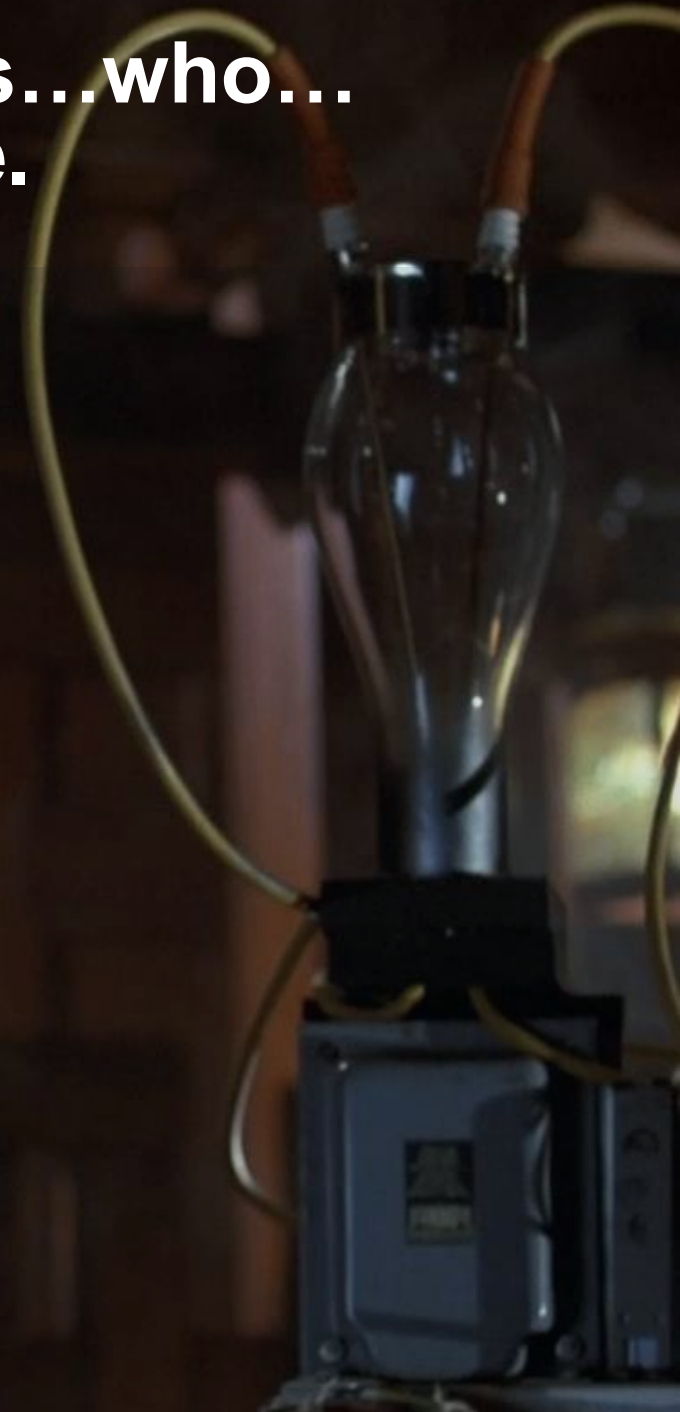
Who's future-ready ?



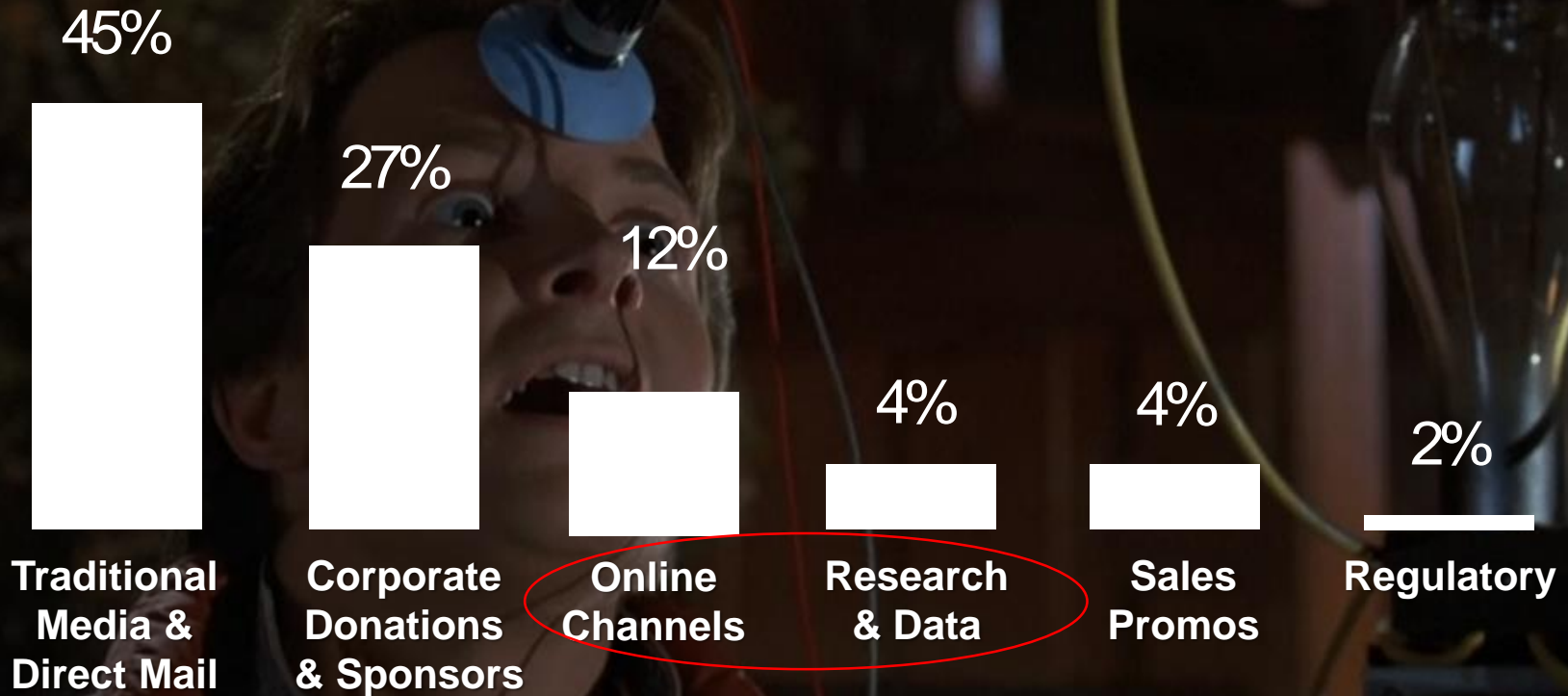
# Future-readiness self-assessment



**Long live the troublemakers...who...  
Influence. Impact. Integrate.**



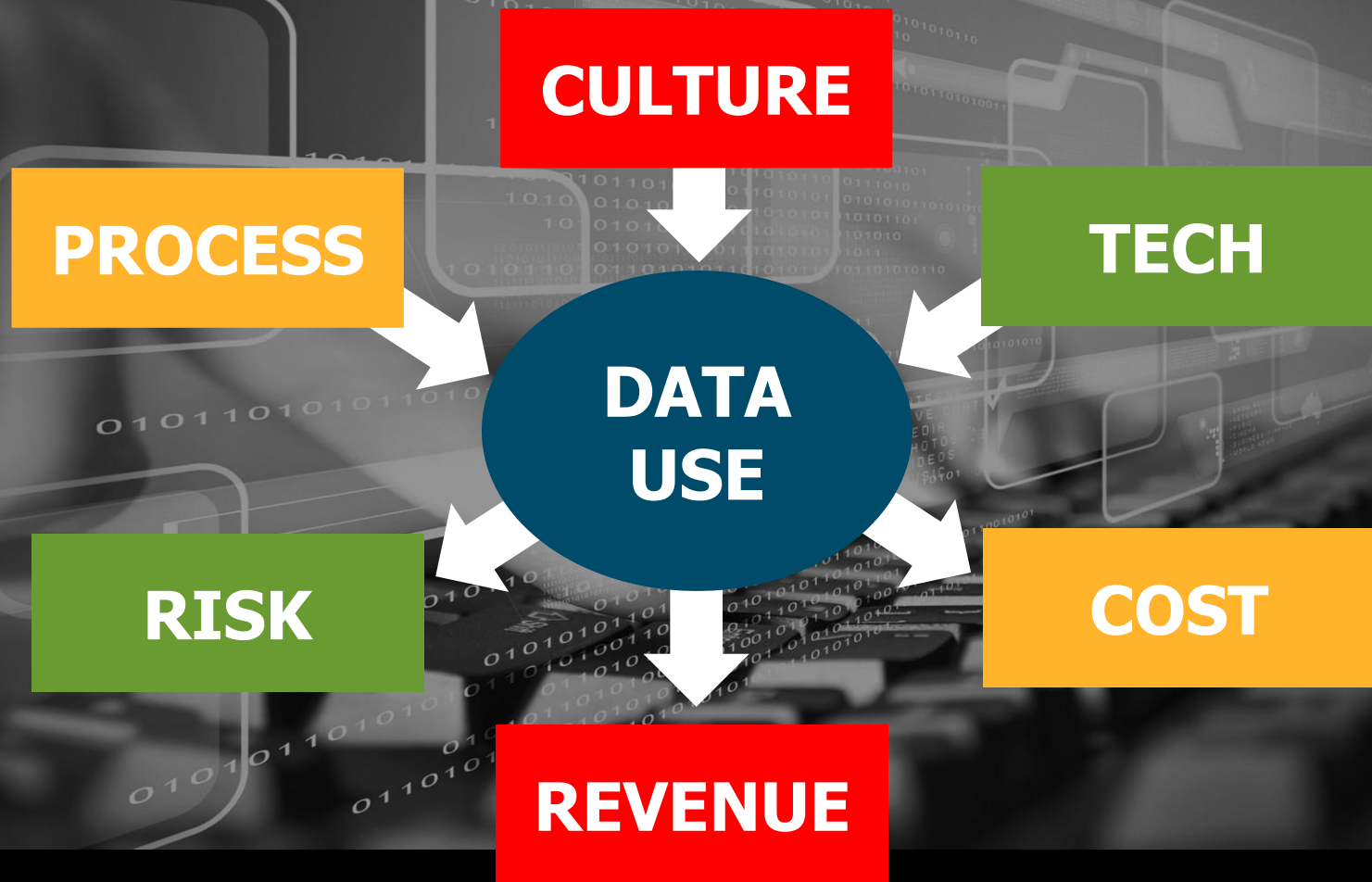
# Influence: Marketing Spend



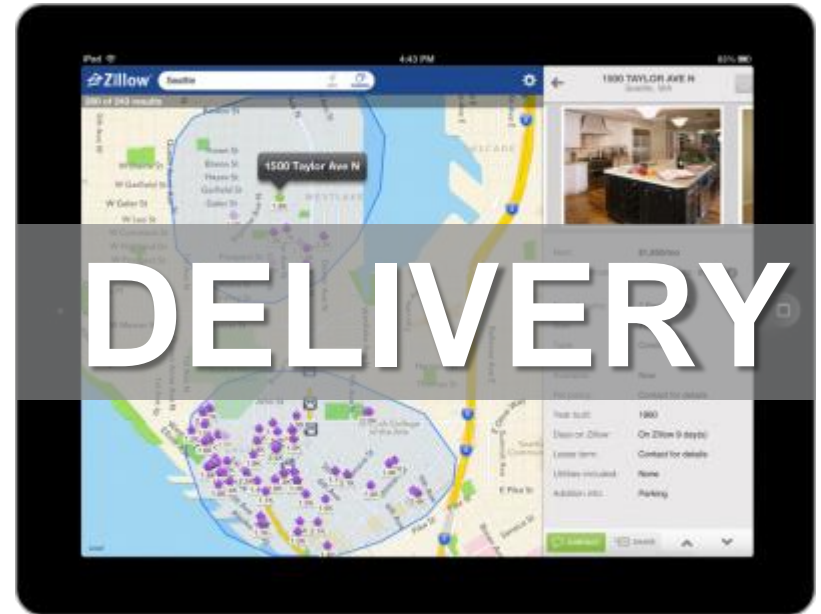
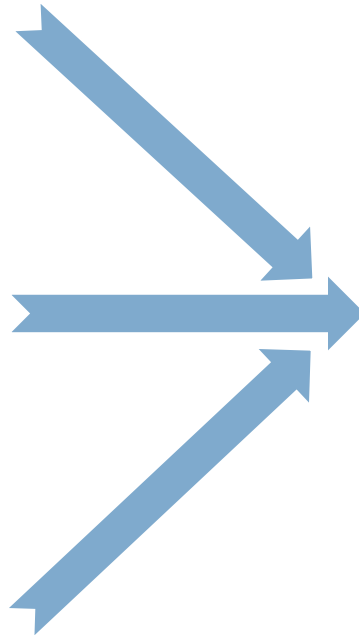
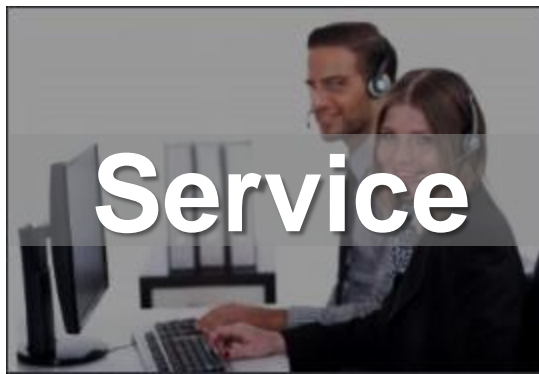
Source: *Cornerstone Performance Report*



# Impact: Analytics Challenge



# Integrate: Marketing = Banking

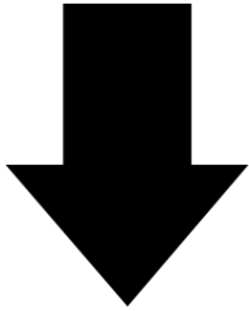




# Influence: Resource Challenge

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## Reduce



- Branches & Square Footage
- Teller Staff & Admin Time
- Inbound Reactive Contact
- ATM Investments
- Transaction Systems Pricing

- Interactive Mobile/Web Tech
- Marketing Talent/Strategies
- Analytical Muscle
- Advisory Staff & Advice Time
- Outbound Proactive Contact

## Redirect



# FUTURE READY

1 INNOVATING

- Strategy
- People
- Process / Tech
- Metrics

2 LEADING

- Strategy
- People
- Process / Tech
- Metrics

3 MANAGING

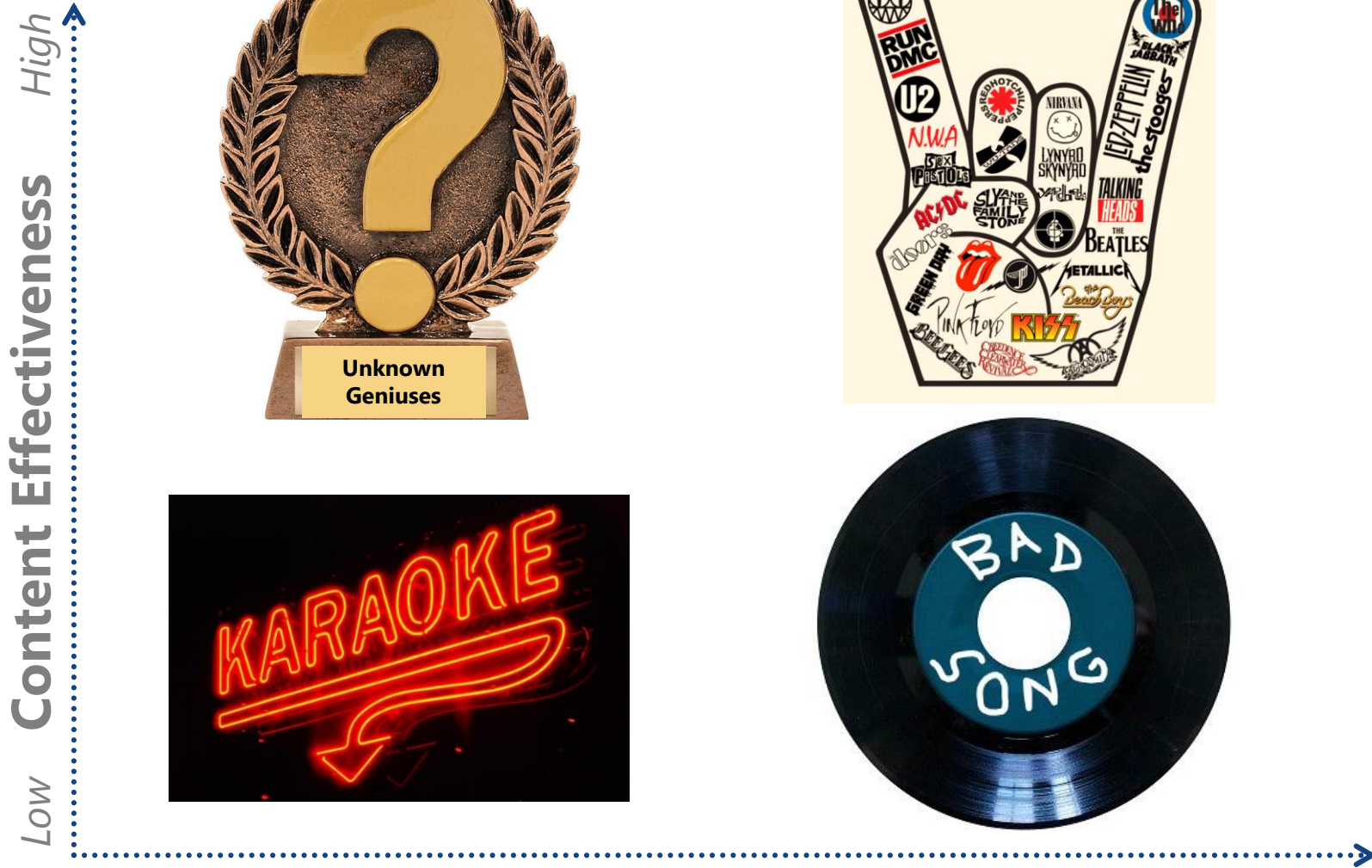
- Strategy
- People
- Process / Tech
- Metrics

4 REACTING

- Strategy
- People
- Process / Tech
- Metrics

**Cornerstone Advisors Future Ready Framework™**

# Integrate: Marketing Your Band



High  
Content Effectiveness  
Low

Low Delivery Maturity High



Low

Delivery Maturity

High

**Influence. Impact. Integrate.  
Long live the troublemakers...**

“Many demographics drive revenue. Our outreach across the institution has our financial education touching 20,000 people a year. We measure the growth impact by segment.”

- CMO

- CMO



**Influence. Impact. Integrate.  
Long live the troublemakers...**

“I’m looking for leaders and don’t care where they sit.”

- CEO asking CMO to lead loan origination/experience overhaul

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# COMING SOON...

## Are Your Payments Future Ready ?

# Q&A Wrap Up

Type your question in the questions panel 

## Sam Kilmer

Senior Director

*Cornerstone Advisors*

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# *Thank You*

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