

Household Acquisition: 3 Best Practices for Planning Your Next Marketing Campaign

October 12th, 2017



**The opinions expressed herein are that of the presenter and not necessarily developed or tested by Harland Clarke.*

Proprietary / Confidential

Presenters



Stephen Nikitas
Senior Strategy Director

Steve Nikitas joined Harland Clarke in October 2010 and has more than 30 years of experience in strategic planning, marketing, public relations and executive speechwriting.

As senior strategist with Harland Clarke Marketing Services, Steve provides consultative services to banks and credit unions, helping them craft marketing and retail strategies and campaigns to take advantage of existing market and financial conditions and to grow targeted portfolios.



Moderator
Rachel Stephens
Product Manager, Marketing Solutions

Rachel Stephens joined the Harland Clarke team in August 2016 and brought with her 10 years of experience marketing products and services for financial institutions.

She has worked on various lines of business within the financial services industry including consumer, small business, commercial, private wealth, investment and institutional banking. She has extensive knowledge in campaign development, marketing strategy, event management, public relations, customer service and sales.

**#1 – Ensure your institution is enabled
for generational marketing**



Q&A

- What are some basic “must haves” for millennials when it comes to choosing a financial institution?
- What are some of the best ways to reach millennials?
- What are some of the best ways to reach other demographics?

**#2 – Know what creates a highly optimized
and focused acquisition campaign**



Q&A

- When it comes to designing an acquisition marketing campaign – what are the things to think about?
- How should I be using my institutions data to target customers?
- What are the questions to ask if using a third party service provider with the campaign?
- Why is using data superior to simply doing a radius marketing campaign?
- How can an institution combat waste during an acquisition marketing campaign?

#3 – Design the campaign with ROMI in mind



Q&A

- What kind of ROMI should an institution look for in a saturation/ acquisition campaign?
- What type of cadence is appropriate for a campaign?
- Over what time period should a campaign run before measuring results?
- How can financial institutions ensure the best ROI?

Q&A Wrap Up

Type your question in the questions panel 

Steve Nikitas
Senior Strategy Director
Harland Clarke

www.harlandclarke.com/webcasts



harlandclarke.com/LinkedIn



harlandclarke.com/Twitter

Presentation materials will be provided
within one week.

Visit harlandclarke.com/webcasts for this
and previous events.

Thank You!

