

Launch Planner Timeline

Maximize Your PFM Launch

Launching PFM requires a multifaceted effort which results in deeper and more meaningful engagement.

MILESTONE 1



EDUCATION & TRAINING

Ensure your employees adhere to the grand strategy and work together. Do your employees know enough about the product to bring customers on board?

Frontline Staff

Provide those who engage your customer with the answers and guidance to channel enrollment into your PFM through product training.

Marketing Staff

What's your strategy to push PFM enrollment? Ensure your marketing team is prepared to position the product to both employees and consumers.

Online Users

Many customers opt to do all their banking online. Don't miss opportunities to tell them about PFM benefits.

MILESTONE 2



POSITIONING

What benefits of PFM appeal to customers? Position your PFM as a way for your audience to reach financial goals.

Product Name

A well-named product compliments your brand while communicating the purpose and simplicity of the product.

Product Blending

PFM can be positioned as a benefit of your deposit and loan products. It helps you differentiate your product and services.

Teasing

Communicate with your audience in person and online to let them know a new product is on its way and what they can expect and when.

Soft Launch

Flip the switch to live! Your employees and early adopters will use this time to become PFM champions.

MILESTONE 3



LAUNCH & PROMOTION

Create a strategy to engage your consumer base with PFM across all marketing channels.

Full Launch

Generate excitement for PFM on your website and through newsletters, email or even direct mail.

Full-Contact Marketing

Become your consumers financial advocate through both in person engagement and digital marketing.

Digital

Reach people online when they check balances, transfer money, pay bills, etc.

Traditional

Statement stuffers, fact sheets and displays all work to reinforce your PFM brand.

MILESTONE 4



PR FOR LAUNCH

The following are guidelines for conducting a public relations push at or shortly after your launch of Geezeo PFM.

Targets

Local publications and TV news, especially consumer advocates/savvy shopper reporters, and consumer advocates.

Questions to Answer

How does PFM support your service strategy? How does PFM fit into your FI's mission and vision? What functionality is built in and how does it benefit consumers?

Pitch to Media

Ease and convenience, environmentally friendly (consolidating account views can reduce statements); financial literacy, a special event tied to the launch (financial management fair); community outreach.

A virtual "press conference" with a product demonstration to show the consumer experience is a great way to reach a large number of journalists in one session.