



# PFM Brand and Communication Strategy Guide

A guide for creating a strategy to position and market PFM for greatest engagement

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## Section One: Marketing PFM

### **Your Brand**

Describe your brand, your mission and vision and identify your core competencies. What differentiates your financial institution in your market? Consider how your PFM solution helps bring your brand to life.

### **The Market**

Identify your target market or ideal customer. Then begin identifying the demographics of your digital user and narrow your market from there. Contrary to belief, digital natives are not just millennials. Think about how you will present the service to each of your key market segments, i.e. which benefits will appeal most to your key segments.

### **The PFM Brand**

Create a unique name and logo for your PFM. But first, look at what your competitor is doing.

### **Employee Communication**

Create a plan to train and educate your staff so they can pass the knowledge on to the consumer. You want your employees using PFM! Decide how you will communicate to your employees before, during and after the launch of the PFM. What training do they need now and what tools do they need to help customers get the most out of the financial management platform in the long-term?

### **Customer Communication**

Your customers need to know what you now offer and, most importantly, how the new service can reduce stress and save time or money. How will you drive new customers to the service and how do you plan to retain and further engage customers with PFM? We always suggest a full-contact, multi-channel launch campaign.

## Section One: Marketing PFM

### **Public Relations**

Let your market know you're taking a position of advocacy for your customers or member. Providing a local angle to a national trend is often very compelling to local news outlets.

### **Business Development**

Community partners provide a unique opportunity to help you promote you PFM. Be sure to include business development in your communications strategy...from educational seminars to community events, PFM is a great benefit to share in the field.

### **Cross-selling PFM**

PFM is a value added benefit of banking with your financial institution. It is a benefit to your suite of digital services and should be marketed with all core products and digital services.

## Section Two: Leveraging PFM

### Adoption Marketing

The adoption strategy involves all of the usual communication channels, but especially online banking and email. Regularly reminding customers about the service, and incorporating it as a primary benefit of other products and services will increase awareness of your PFM and adoption of the tool by new and existing customers.

### Retention Strategy

Developing habits and maintaining them is a lot of work and customers need gentle support when it comes to financial management. PFM users you gain during your initial launch and other promotional campaigns can be retained by providing them with relevant content to promote financial health and long-term success.

### Setting Your PFM Goals

Setting a goal for your first year adoption of the tool is a great way to provide focus for your marketing and training efforts.

Example PFM Adoption Goal: Within six months of launch at least x,xxx online banking users or xx% of OLB users should have logged into PFM NAME at least once. x,xxx or xx% of these users can be classified as active in the last xx days.

The purpose of reaching these goals is to build a critical mass of customers who actively use the PFM. As your level of adoption rises, you gain access to the larger amount of customer data. This results in an increase marketing and cross-sell opportunities.

### Using PFM To Cross-Sell

Create a proactive strategy for leveraging PFM data. PFM offers robust data within the platform, so you can cross-sell product online. It's included in PFM as no additional cost. The platform even allows your campaign artwork to be easily added at anytime, so you are always consistent across all marketing channels.

To learn more, contact your  
Geezeo Client Success Manager or Marketing Liaison.