

MAXIMIZING THE PFM LAUNCH

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

EDUCATION

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.



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.

LAUNCH & PROMO

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.