Marketing Made Personal
• What do you think of when you hear "marketing"?
• https://www.menti.com/opkvi552hu
What is Marketing?
My definition: Connecting people with Oweesta’s products
Identify Competitors
Marketing Strategy: Identify Goals

- Reference your overall business plan/strategy
- Clearly identify goals that will support your overall business plan/strategy
Marketing Strategy: Identify Goals

- **Specific**: State what you’ll do. Use action words.
- **Measurable**: Provide a way to evaluate. Use metrics or data targets.
- **Achievable**: Within your scope. Possible to accomplish, attainable.
- **Relevant**: Makes sense within your job function. Improves the business in some way.
- **Time-bound**: State when you’ll get it done. Be specific on date or timeframe.

Amplifying Our Collective Voice
7th Annual Native CDFI Capital Access Convening  June 28-30, 2022  •  Virtual
Marketing Strategy: Personas

**JUSTIN, 31**
- **Demographics**
  - Middle-school teacher in a suburban area
  - Currently single, thinking of getting married next year
- **Behavioral Identifiers**
  - Cooks for family
  - Plans to buy a first home

**MAGGIE, 52**
- **Demographics**
  - Woman with a B.A. in education
  - Living in a 4-bedroom home in a coastal city
  - Married to a retired military officer
- **Behavioral Identifiers**
  - Reads the news daily
  - Plans to travel to Europe next year

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**Amplifying Our Collective Voice**
7th Annual Native CDFI Capital Access Convening June 28-30, 2022 • Virtual
Find Your Audience

• Who are you targeting?
  • Reference your goals. Who is supposed to “fulfill” your goals?

• Example goal:
  Disburse $500,000 in first-in loans
  • Audience: emerging CDFIs, small Native CDFIs

• Example goal:
  Bring in $100M into Indian Country over the next 5 years
  • Audience: Philanthropic institutions, investors/banks
  • Maybe: Press
Audience to Persona
Persona: Your Ideal Customer(s)

**Working Mom Wendy**

**ROLE:** Healthcare decision maker  
**AGE:** 30 to 50  
**FAMILY:** Kids under 18

**Background**
Wendy is a working mom who is balancing her career with raising a family. She's an educated, on-the-go woman who uses online resources for just about every aspect of her life - from cooking to parenting.

**Goals**
- Keep her family healthy
- When someone in her family is ill, she wants quick, convenient, and reliable care

**Challenges**
- As her children grow older, she doesn't necessarily have a dedicated primary care physician
- Her busy work schedule makes it challenging to take sick days for her or her children

**KEY IDENTIFIERS**
- Full-time career
- Family-first values
- Educated
- Seeks health information online
- Does her research

**How We Help**
- Provide online scheduling and same-day appointments for quick service
- Make care easily accessible from work or home with convenient locations
- Produce online health resources
Example Questions

1. Name
2. Age
3. Location
4. Occupation
5. Bio

1. Motivations for ____
2. Goals for ____
3. Frustrations
Persona: Your Ideal Customer(s)

Working Mom Wendy

Role: Healthcare decision maker
Age: 30 to 50
Family: Kids under 18

Background
Wendy is a working mom who is balancing her career with raising a family. She's an educated, on-the-go woman who uses online resources for just about every aspect of her life - from cooking to parenting.

Goals
- Keep her family healthy
- When someone in her family is ill, she wants quick, convenient, and reliable care

Challenges
- As her children grow older, she doesn't necessarily have a dedicated primary care physician
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How We Help
- Provide online scheduling and same-day appointments for quick service
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Key Identifiers
- Full-time career
- Family-first values
- Educated
- Seeks health information online
- Does her research
Disney Dreamer Dana

- **Name:** Disney Dreamer Dana
- **Age:** 32
- **Location:** Rez
- **Occupation:** cashier

**Bio**

She is a mom of 2 young kids and works long hours to support her family. She has very little free time. When she is free, she’s tired and rather would rather watch TV at home than go out. She aspires to take her family to Disneyland one day. She wants to manage her money better and no longer live paycheck to paycheck.

**Motivations**

- Vacation with family (Disneyland)
- Financial freedom
- Spending more time at home
- Financial management

**Goals for taking a financial literacy class**

- Financial freedom
- Establish a savings plan for the vacation
- Debt management/manage her money

**Frustrations**

- Not making a lot in her current job and classes won’t help her make more money
- Sees her goals/dreams as impossible to achieve
- Medical emergencies/she’s busy
10 mins
Groups of 4
Complete a persona together (including a picture)
Person with soonest birthday will share
Your marketing goal is: **increase BNC graduation rate by 15%**
Joint Activity

• Option 1 – Low Credit Score Larry
  • Larry has raked up some credit card debt in the past few years. He doesn’t see a way out of it right now. He was too proud to get help but now the problem is out of hand and he’s getting calls from collections agencies. He feels his needs are urgent!

• Option 2 – Off the Grid Oscar
  • Oscar is older. He doesn’t have social media, uses a flip phone still, and most likely keep his money in his mattress. He doesn’t see the need for financial literacy and is a bit trustful of you (why are you asking him about money if not to rob him?). His daughter keeps encouraging him to take a course so he can be set up for retirement.
Joint Activity

1. Name: Off the Grid Oscar
2. Age:
3. Location:
4. Occupation:
5. Bio: Oscar is older. He doesn’t have social media, uses a flip phone still, and most likely keep his money in his mattress. He doesn’t see the need for financial literacy and is a bit untrustful of you (why are you asking him about money if not to rob him?). His daughter keeps encouraging him to take a course so he can be set up for retirement.

1. Motivations for ____
2. Goals for ___
3. Frustrations
Joint Activity

1. **Name:** Low Credit Score Larry
2. **Age:**
3. **Location:**
4. **Occupation:**
5. **Bio:** Larry has raked up some credit card debt in the past few years. He doesn’t see a way out of it right now. He was too proud to get help but now the problem is out of hand and he’s getting calls from collections agencies. He feels his needs are urgent!

1. **Motivations for ____**
2. **Goals for ____**
3. **Frustrations**
Use Data (or Knowledge) to Create Personas

- Google Analytics
- Social Media
- Market study
- Email sign ups
- Surveys and quizzes
- Local events
- Engage with your community
Reaching Your Personas

• Option 1 – Low Credit Score Larry
  • Larry has raked up some credit card debt in the past few years. He doesn’t see a way out of it right now. He was too proud to get help but now the problem is out of hand and he’s getting calls from collections agencies. He feels his needs are urgent!

• Option 2 – Off the Grid Oscar
  • Oscar is older. He doesn’t have social media, uses a flip phone still, and most likely keep his money in his mattress. He doesn’t see the need for financial literacy and is a bit trustful of you (why are you asking him about money if not to rob him?). His daughter keeps encouraging him to take a course so he can be set up for retirement.
Joint Activity – Marketing

• Social media, newspaper advertisement, meet in person
Breakout

• 10 mins
• Groups of 3
• Complete a persona together (including a picture)
• Person with soonest birthday will share
• Your marketing goal is: increase BNC graduation rate by 15%
Questions?