Marketing Made Personal

Menti

- What do you think of when you hear "marketing"?
- https://www.menti.com/opkvi552hu

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What is Marketing?

What is Marketing?

Online Marketing
Public Relations
Branding
Advertising
Publicity
MARKETING
Social Media
Pricing
Research
Strategy
Direct Marketing
Social Media
Direct Marketing
Advertising
Marketing covers many areas

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
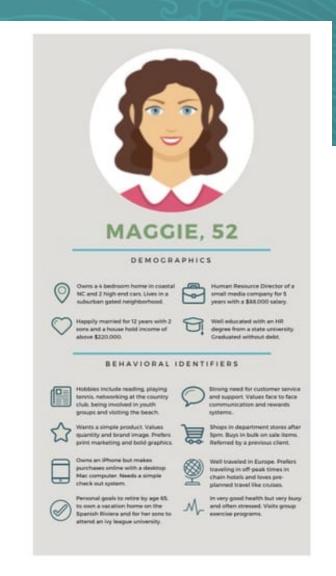
Marketing Strategy: Identify Goals

S Specific
State what you'll do
Use action words

M Measurable
Provide a way to evaluate
Use metrics or data targets

A Achievable
Within your scope
Possible to accomplish, attainable

R Relevant
Makes sense within your job function
Improves the business in some way

T Time-bound
State when you'll get it done
Be specific on date or timeframe

Marketing Strategy: Personas

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

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

Persona: Your Ideal Customer(s)

Working Mom Wendy

ROLE . . . . Healthcare decision maker

AGE . . . . .30 to 50

FAMILY . . . . Kids under 18

KEY IDENTIFIERS

Full-time career

Family-first values

Educated

Seeks health information online

Does her research

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

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

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Example Questions

1. Name

2. Age

3. Location

4. Occupation

5. Bio

1. Motivations for _____

2. Goals for ____

3. Frustrations

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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

Breakout

- 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.

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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**

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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

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Reaching Your Personas

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Joint Activity – Marketing

- Social media, newspaper advertisement, meet in person

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Breakout

- 10 mins

- Groups of 3

- Complete a persona together (including a picture)

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Questions?

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Northwest Area Foundation
Reducing Poverty. Building Prosperity.

BANK OF AMERICA

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