



Amplifying Our Collective Voice

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

Marketing Made Personal

Special Thanks to This Year's Sponsors



Northwest Area
Foundation

Bank of America



Menti

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



What is Marketing?

What is
Marketing?



My definition: Connecting people with
Oweesta's products



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Identify Competitors



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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



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Marketing Strategy: Personas



JUSTIN, 31

DEMOGRAPHICS

-  Rents a 1 bedroom apartment in uptown Atlanta with his partner. Saving to buy a home next year.
-  Works 40 hours a week in a 5 star hotel as a superintendent with a net income of \$120,000.
-  Recently engaged to his boyfriend of 5 years with plans to marry in NYC in the winter.
-  Graduated from a community college with honors and held office in 3 on-campus clubs.

BEHAVIORAL IDENTIFIERS

-  Hobbies include vegan cooking, yoga, monthly massages, playing the drums, volunteering, drinking cocktails and watching local plays.
-  Prefers to call for customer service and support. Values follow up summary emails and easy to read directions.
-  Wants free shipping on large orders. Values quality and privacy. Extremely brand loyal. Prefers email marketing.
-  Shops online between 8am-5pm and makes multiple returns. Uses Paypal at checkout.
-  Owns an iPhone and tablet. Shops on his tablet with referrals from email marketing and promotions.
-  Travels in the USA twice a year to visit family in Maine and California. Prefers long road trips and holiday travel.
-  Personal goals to become a general manager within 4 years and to purchase a suburban home after his wedding and honeymoon.
-  Cooks very healthy and with local products. Has great self care and is very active.



MAGGIE, 52

DEMOGRAPHICS

-  Owns a 4 bedroom home in coastal NC and 2 high end cars. Lives in a suburban gated neighborhood.
-  Human Resource Director of a small media company for 5 years with a \$68,000 salary.
-  Happily married for 12 years with 2 sons and a household income of above \$220,000.
-  Well educated with an HR degree from a state university. Graduated without debt.

BEHAVIORAL IDENTIFIERS

-  Hobbies include reading, playing tennis, networking at the country club, being involved in youth groups and visiting the beach.
-  Strong need for customer service and support. Values face to face communication and rewards systems.
-  Wants a simple product. Values quantity and brand image. Prefers print marketing and bold graphics.
-  Shops in department stores after 5pm. Buys in bulk on sale items. Referred by a previous client.
-  Owns an iPhone but makes purchases online with a desktop Mac computer. Needs a simple check out system.
-  Well traveled in Europe. Prefers traveling in off peak times in chain hotels and loves pre-planned travel like cruises.
-  Personal goals to retire by age 65, to own a vacation home on the Spanish Riviera and for her sons to attend an ivy league university.
-  In very good health but very busy and often stressed. Visits group exercise programs.



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



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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



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



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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.



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
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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?





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