

# MARKETING AND SALES ASSESSMENT

At RPI, we believe that the disciplines of sales and marketing are vital to a bank's success. Marketing is a statistical, analytical science that requires originality, inventiveness, technology savvy, graphic skill, social engagement, and leadership. Selling requires skills of need identification, relationship building, product value articulation, and exceptional customer service. This ensures the relationship is a lasting, multi-faceted, mutually beneficial one that creates customer loyalty, which is more valuable than transient customer satisfaction. Selling services is about people: your people and the people you serve.



## THE MORE THINGS CHANGE

Attuned to differences in markets, leadership styles, and financial strategies, RPI partners with banks to create marketing strategies and tactical plans that

- Build on the strategic vision of the organization within marketing channels
- Balance channel delivery profitability with the customer and prospect segments
- Engage local small business markets and consumer segments
- Anticipate and manage ongoing market changes
- Innovate with leading marketing technologies, from social media to CRM technology to lead generation and drip marketing plans
- Expand consumer and small business market share
- Attract high performance marketing and sales talent
- Measure campaign success and profitability

## WHAT DOES A MARKETING PLAN LOOK LIKE, ANYWAY?

Marketing plans of the past were often simply marketing calendars. On this date this ad would be in this publication, or this group would receive this mailing. Because of the new direction that technology has allowed bank marketers to go, a successful bank marketing plan is often as complex and richly layered as the bank's thoroughly constructed strategic plan itself.

Drawing on the fundamentals of the bank's vision and strategy, it is the responsibility of bank executives to determine the best ways to reach the bank's core prospects and customers, with what messages, through what media, and at what time. It is also marketing's role to support the sales staff with ongoing, relevant marketing materials and campaigns. The moving pieces and parts of a bank's marketing efforts require careful planning and discipline, coupled with creativity and imagination.

## FROM WHERE WE ARE TO WHERE WE NEED TO GO

RPI's team can help you assess the success of your current marketing team, marketing plan, and marketing ROI, and then work with you to implement changes that can bring your marketing discipline out of the realm of administration and into the realm of a creative and efficient process, consistently producing results.

## THE BRANCH IS DEAD. LONG LIVE THE BRANCH

In the early 90s, some futurists predicted the death of the bank branch. Bankers have spent so long incenting customers to use alternative delivery channels that they are now left wondering why no one comes into the branch anymore. Despite that contradictory circumstance, however, the FDIC reports that branches have continued to open at a higher pace than anyone expected. But do new branches equal profitable branches? Clearly, they do not.

RPI's team will help you understand whether your branch network aligns with the profitable market segments in your markets and the best ways for branches to remain  relevant with your most profitable customers.

