

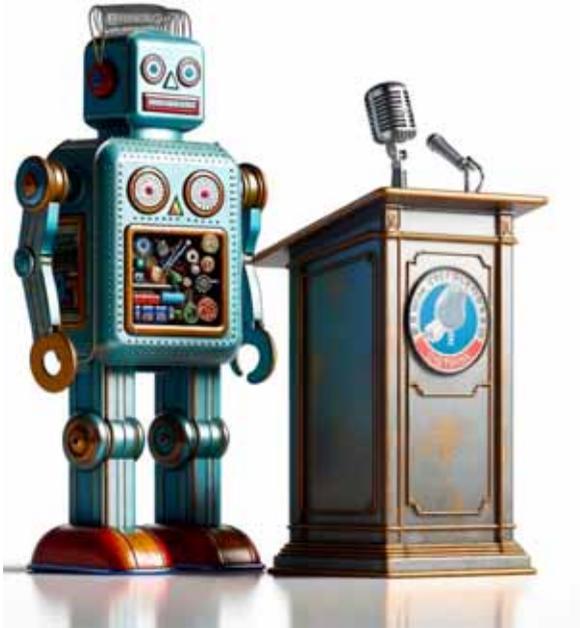
Supercharging Financial Marketing Content with ChatGPT

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Lake Ridge Bank

THE FINANCIAL BRAND

FORUM

Agenda



1. Concerns and Prompts
2. Generate Your Brand Voice
3. Create a Personal GPT
4. Create Content with Your GPT

Use Your Current Processes & Procedures

The last
step is
never AI.

Privacy Concerns

Update Current Policies
Be Explicit and Clear
Reinforce Frequently

Bias

Read Before Releasing
Follow Your Current Processes
Prompt For New Perspectives

Fact Checking

Fact Check AI
Ask for Citations
Use AI for Stronger Facts

Hallucinations

Use Good Prompts
Hallucinations are "Creativity"
Limited in Financial Services

Act As...

The objective...

Use a tone...

Your audience...

Use keywords...

Format with...



Prompt Example

"Act as a marketing director, the objective is to write a blog which takes five minutes to read and focuses on selling a checking account to one product households. The audience is Upscale Empty Nesters. Your tone is educational and helpful. Format with paragraphs but include three bullet points with features and benefits. Use key words "make banking easy" or versions of this idea. Write at a 10th grade reading level. Include a call to action which directs the prospect to meet with a Personal Banker."

Build Your Brand Voice

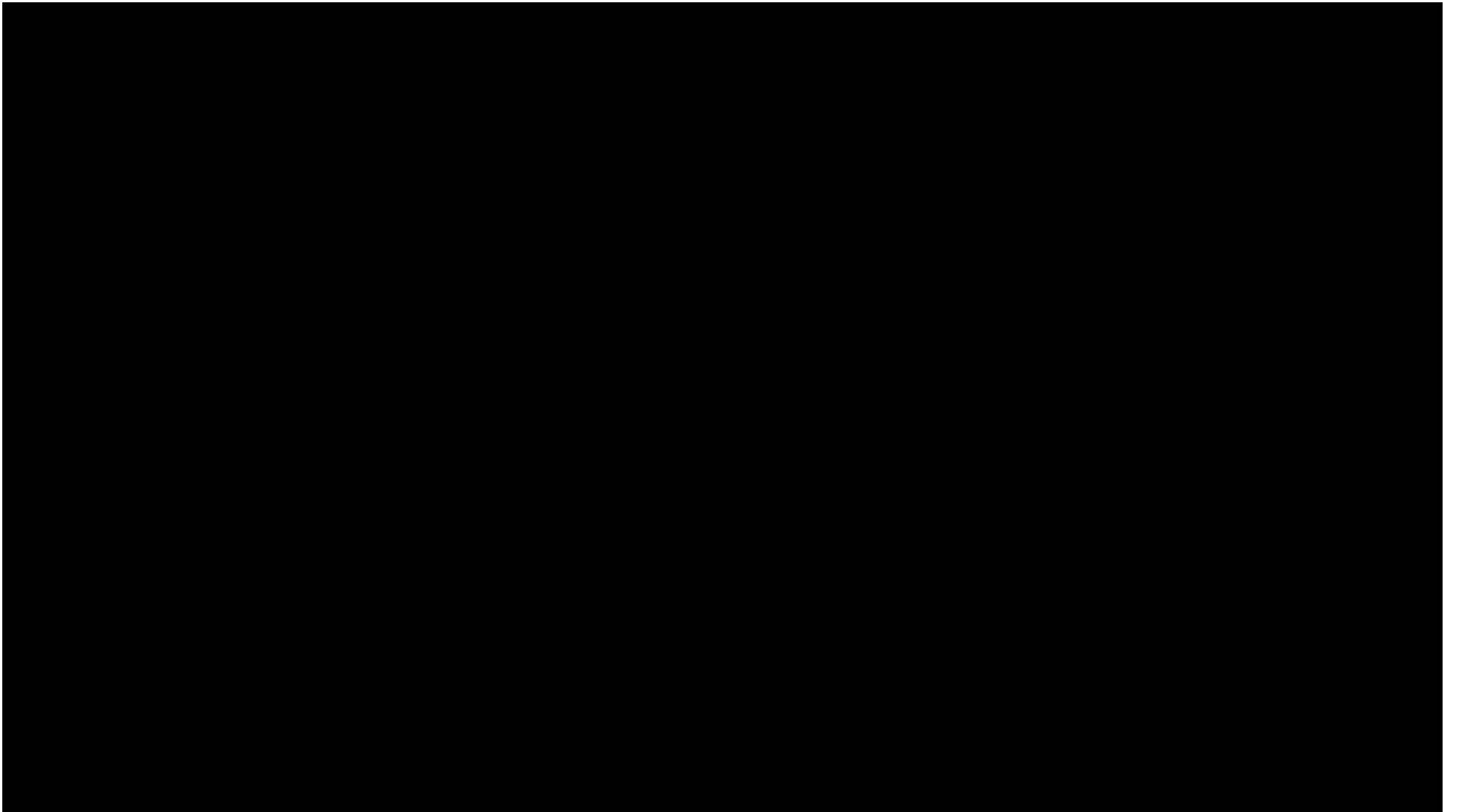
Step 1



1. Collect Brand Samples

2. Upload Into ChatGPT

3. Prompt and Refine Your Output

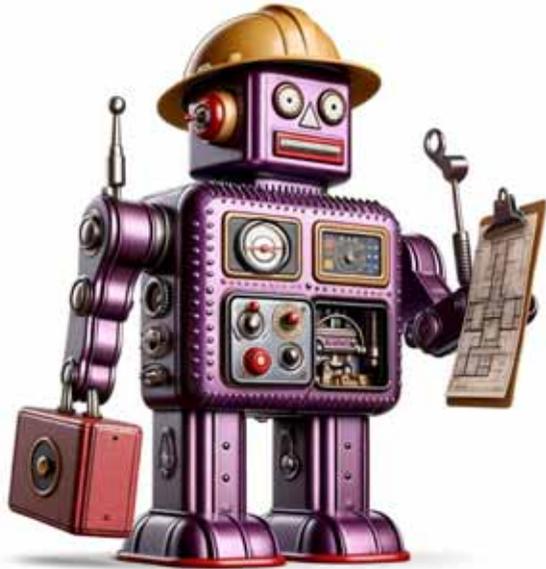


Dial in Your Voice

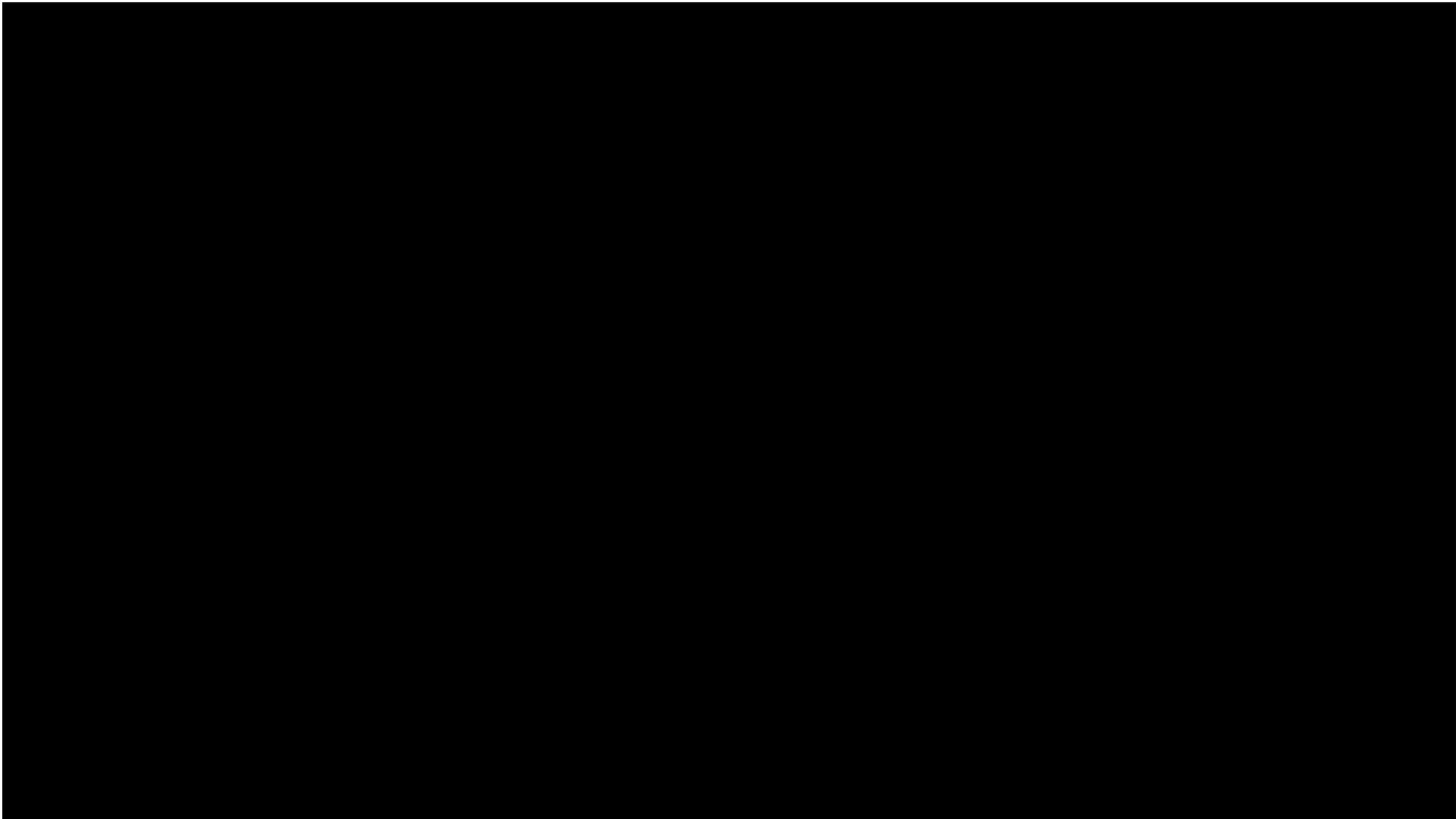
- Don't take the first result, work with ChatGPT like a consultant.
- Edit and update with use.
- Add important info like contact info, taglines, and keyword requests.
- Instruct AI to correct wording, or list words to avoid.

Build Your GPT

Step 2



1. Create a GPT
2. Write Your Instructions
3. Create Conversation Starters
4. Upload Files Into Knowledge

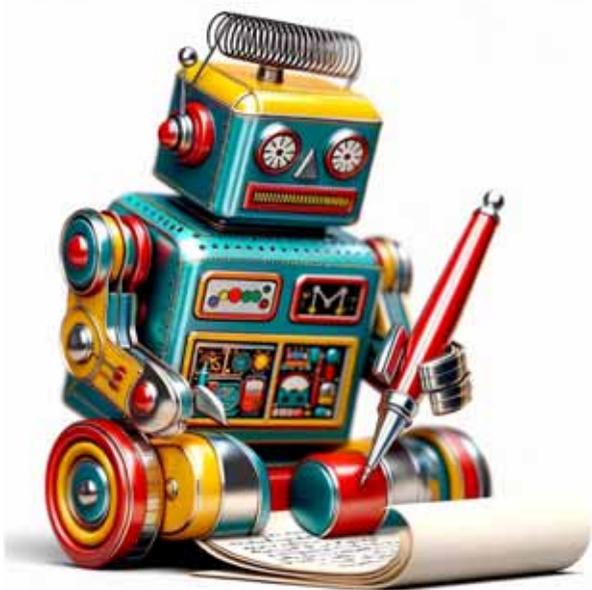


Dial in Your GPT

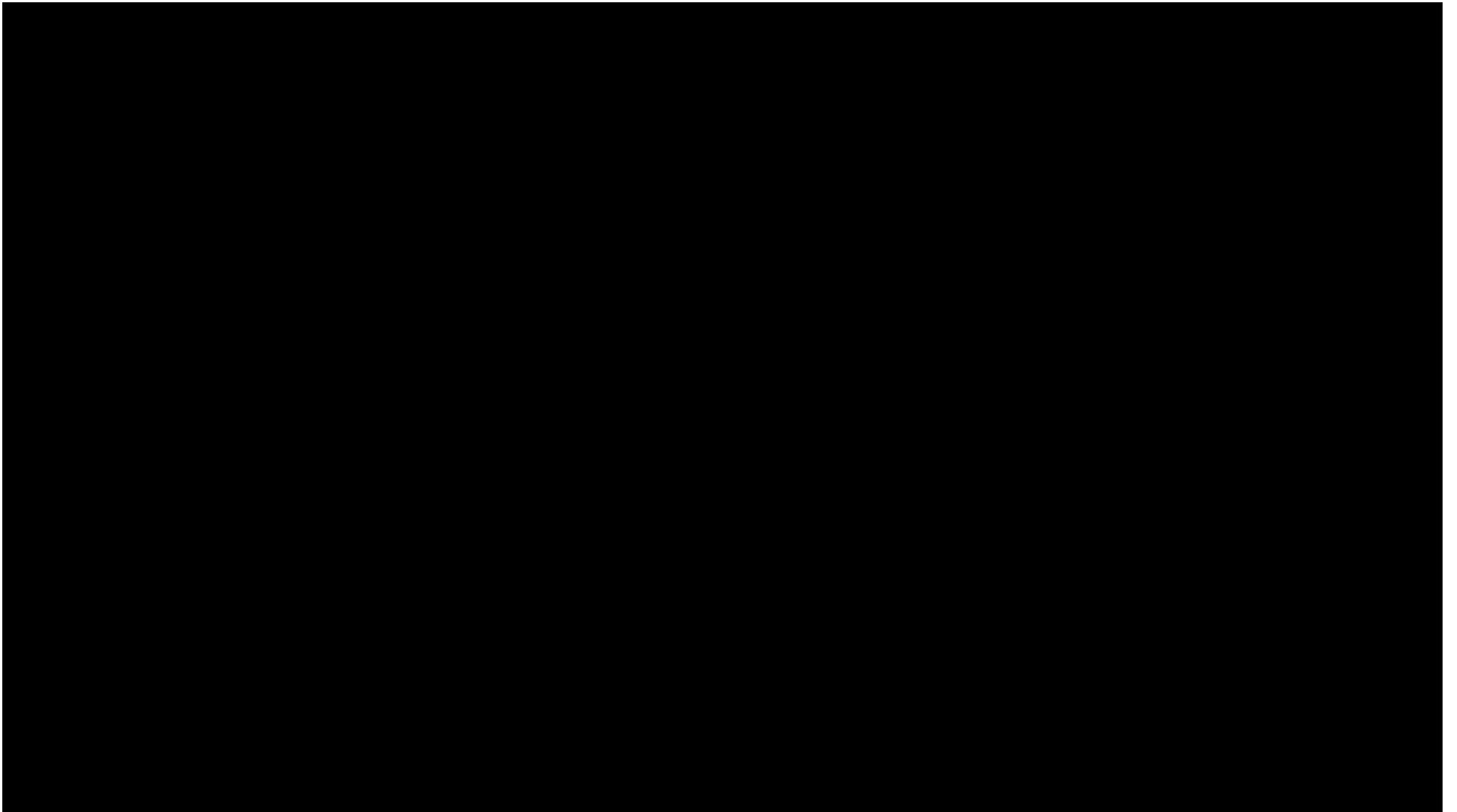
- Test and refine your GPT.
- Upload content into Knowledge for large prompts and resources. Try to use one file.
- Use clear steps, templates, examples, and outcomes to guide AI.

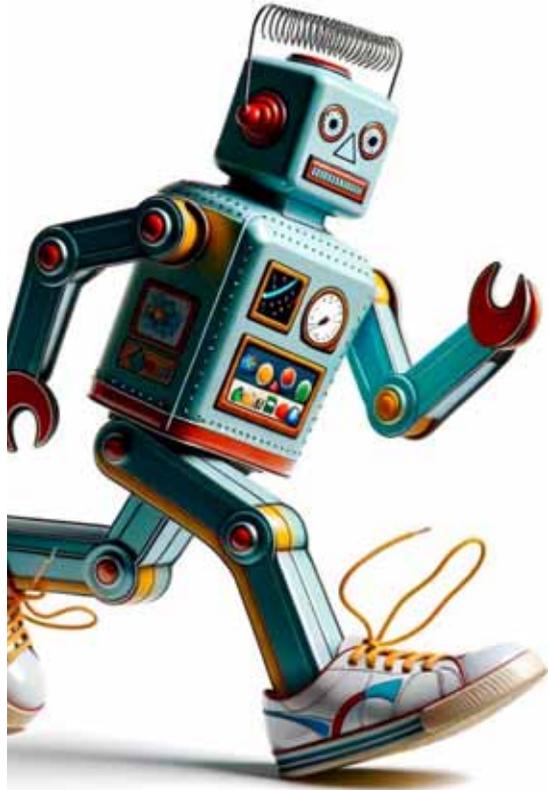
Create Content

Step 3



- Provide Specific Direction with Prompts
- Magic Happens When You Stack Prompts
- Start Easy Then Build





Take Action

1. Start with AI
2. Try different models
3. Follow AI leaders
4. Be creative and push AI

Question & Answer

Contact Me



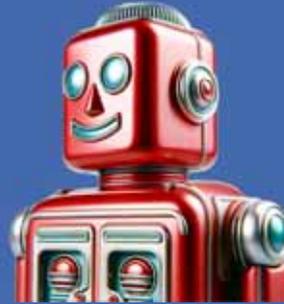
Ben Udell

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**Robots Are
People**

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**The Example
GPT**

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Presentation

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