

# Optimizing Your Marketing Budget for Maximum ROI

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THE FINANCIAL BRAND

**FORUM**

# Speakers



Jessica Pelache

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Experience Officer (CXO)

First National Bank of Texas



Erin Pryor

SEVP, Chief Marketing &  
Experience Officer

First Horizon Bank



Amy Basta

SVP, Chief Marketing Officer

SECU Credit Union



Sharon Cook

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Former Bank CMO

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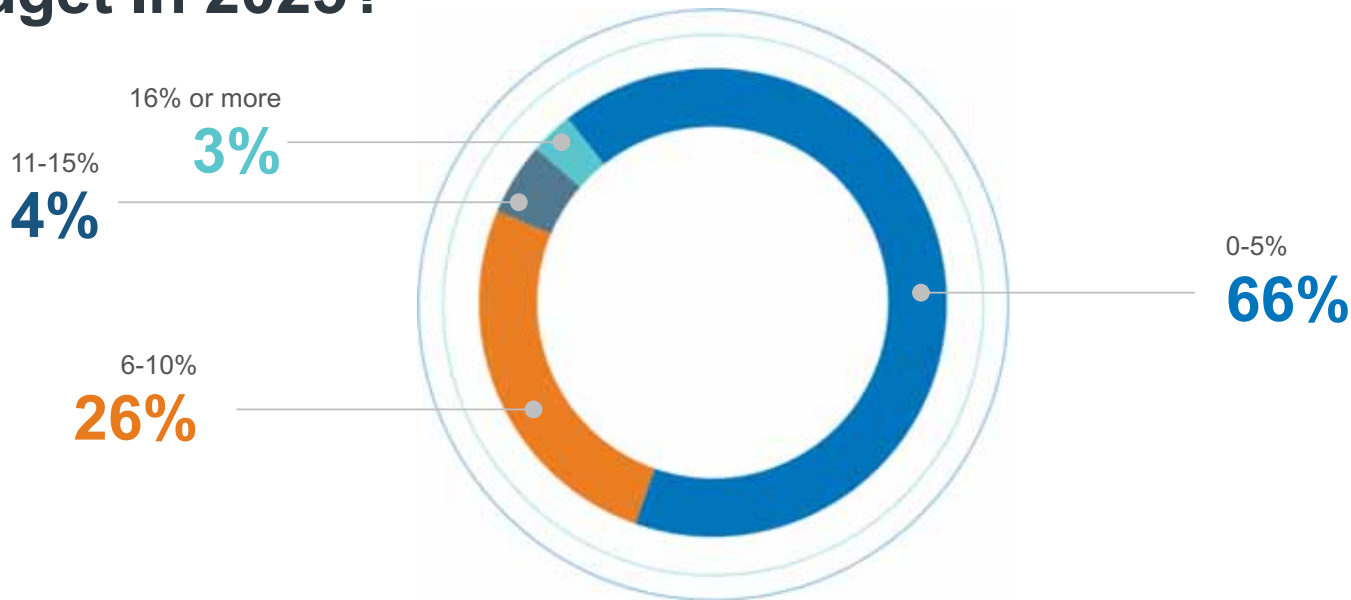
# Today's Discussion

- Vericast's Marketing Budget Study
- Panelist Discussion
- Key Takeaways

# 2025 Marketing Budget Study

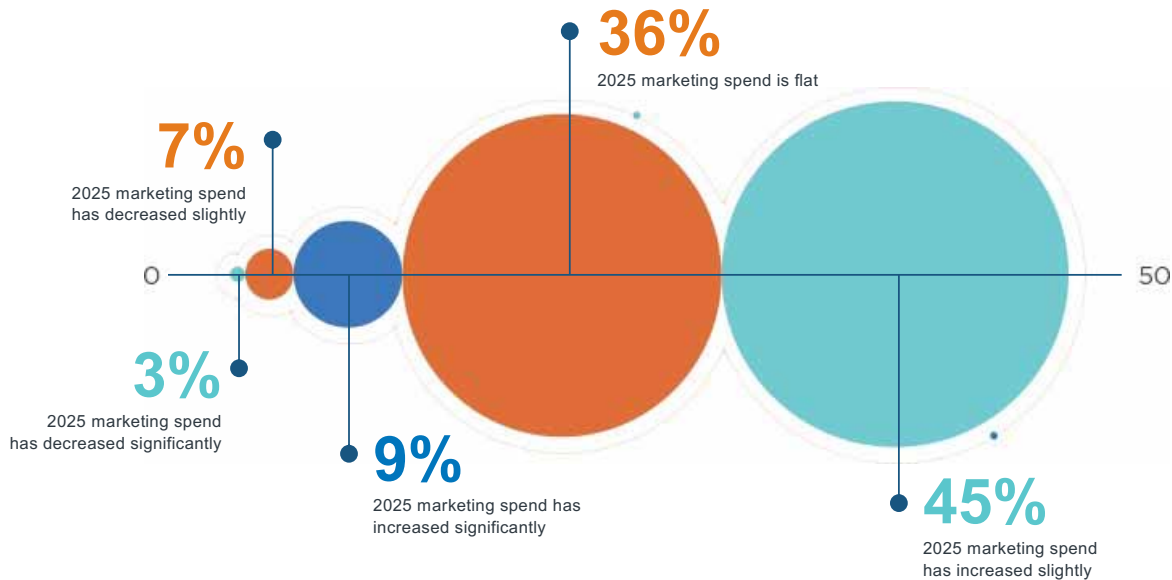


# What Percentage Of Your Revenue Is Being Allocated To Your Total Marketing Expense Budget In 2025?



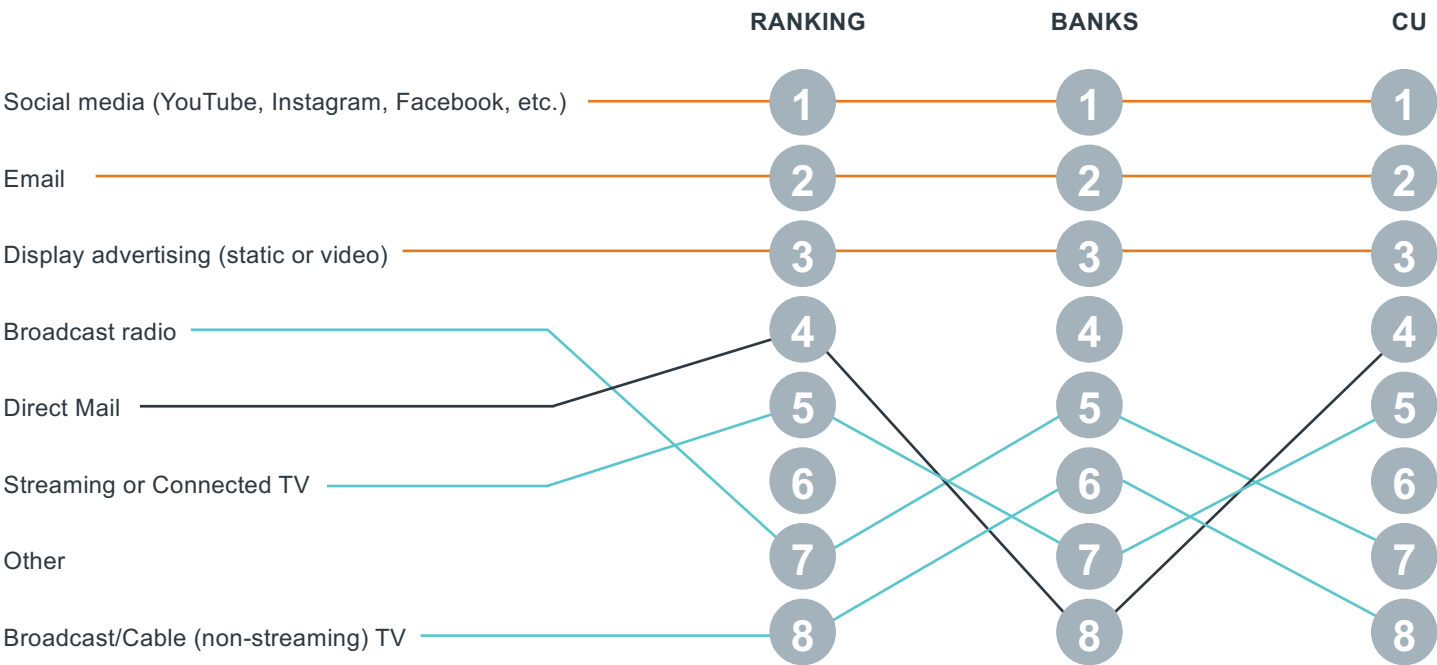
Source: Vericast Marketing Budget Study, February 2025, n=157

# What Best Describes Your Total 2025 Marketing Budget Compared to Last Year's?



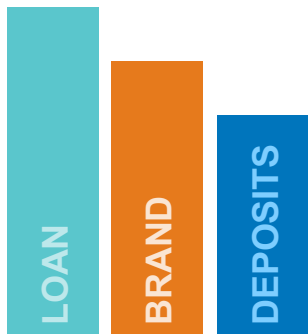
Source: Vericast Marketing Budget Study, February 2025, n=157

# Marketing Channels in Order of Importance for Strategy



# Let's Take a Look at Strategy

## Ranking of Top Priorities



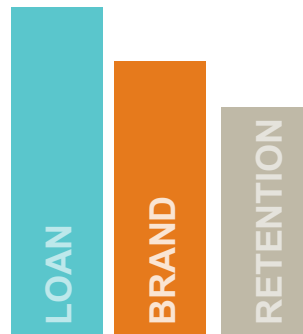
### General

1. Grow loan balances
2. Improve brand awareness
3. Grow deposit balances



### Bank

1. Grow deposit balances
2. Grow loan balances
3. Improve brand awareness



### CU

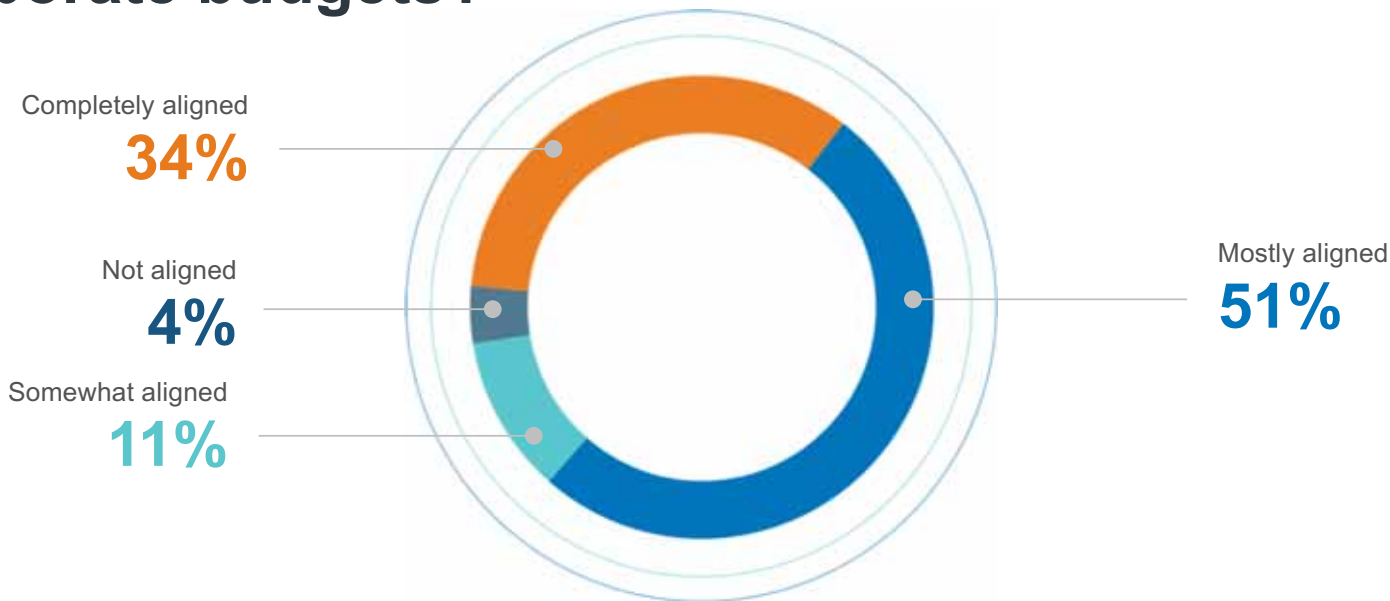
1. Grow loan balances
2. Improve brand awareness
3. Improve retention

Source: Vericast Marketing Budget Study, February 2025, n=157

Takeaway:



# How aligned is your marketing department with the (CFO) or the team responsible for corporate budgets?



Source: Vericast Marketing Budget Study, February 2025, n=157

# Let's Hear From Our Panelists



Panel Question:

What are your best practices for crafting an effective marketing budget?

**Panel Question:**

Where have you been making increases and decreases to your marketing budget?

## Panel Question:

What media channels  
have been the most  
critical to your goals  
and have had the  
most success?

Panel Question:

How do you balance  
your marketing  
budget across  
multiple objectives?

**Panel Question:**

How can CMOs and  
CFOs work best  
together?

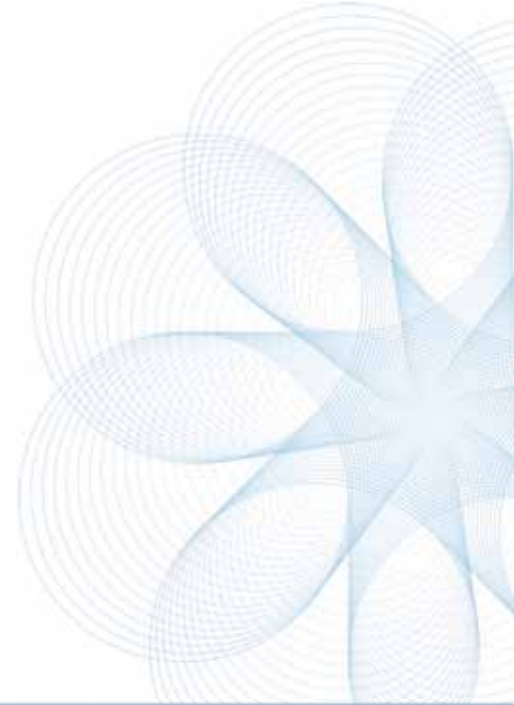
# Key Takeaways





# Three Things CMOs Must Be Able To Do Effectively

- **1** Adapt to market disruptions and changes in business.
- **2** Earn the respect of senior peers.
- **3** Communicate a clear strategic plan.



# Four Takeaways For Working With Your CFO

- **1** Develop a comprehensive marketing strategy that aligns with the institution's overall financial goals, highlighting how increased marketing spend can drive revenue growth and profitability.
- **2** Present a detailed analysis of past marketing campaigns, highlighting the return on investment (ROI) and how future campaigns can generate similar or better results.
- **3** Conduct market research to identify new opportunities and trends and use this data to make a compelling case for the necessity of a larger marketing budget
- **4** Establish a clear, measurable set of key performance indicators (KPIs) for marketing activities and propose a plan to regularly review and report these metrics to the CFO to ensure transparency and accountability



# Questions?