

Marketing Roles

Your marketing team needs to be equipped to meet today's challenges. Here are three steps (fair warning, these are big steps) to help you do that:

1 ID your capacity in these six critical marketing roles:

Each of the six roles can be filled with any contribution of one person, several members of the internal bank team, a team of bankers and outside partners, or an outside partner/partnership.

The top row of roles is global and strategically focused. If you are still using marketing as just arms and legs, you may not have anyone filling some (or all) of them.

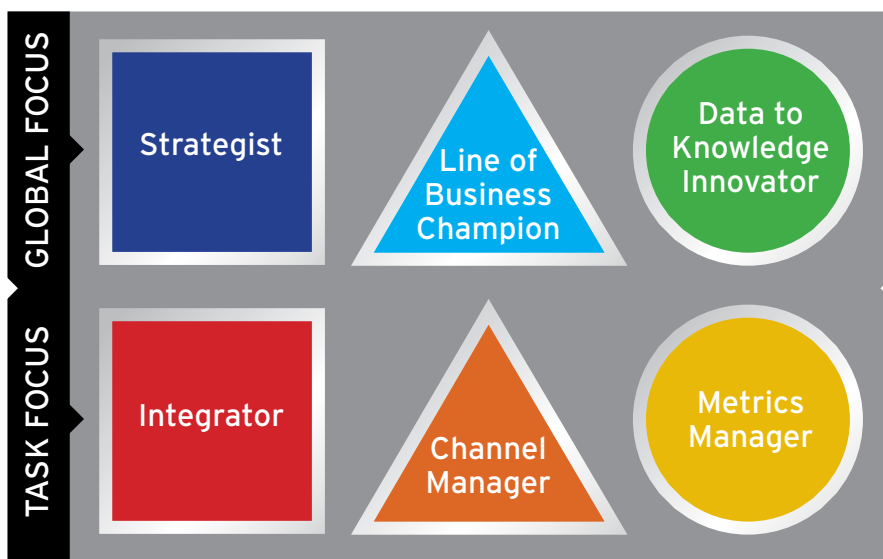
Your Strategist needs to be at the senior management level and your Line of Business Champion needs to fully understand all your lines of business.

Every bank is sitting on a treasure trove of data. Filling the green circle is your biggest marketing challenge. And your biggest opportunity.

The bottom row is tactically focused. Your Integrator manages partners and projects. Your Channel Manager has the responsibility for omnichannel experience management and budgeting ad spends. Your Metrics Manager is key because defining success and efficient use of resources is non-negotiable today.

If you discover the same person is the sole role owner of *most* of these roles or you have no one spending much time in one of them, it will help you see where you need to go.

MARKETING TEAM ROLES



Use this responsibility roster to help you define these roles ▼

Strategist

- Executive level; involved in strategic planning
- Relevance and synergy advocate
- Marketing/PR planning oversight
- PR crisis management
- Objective is to stimulate demand

Line of Business Champion

- Gather and prioritize line of business customer and market needs based on line of business goals
- Objective is to service line of business needs

Data to Knowledge Innovator

- Leverage CRM, internal and external research; data mining
- Evaluate marketing and financial metrics
- Monitor alignment of goals and results
- Objective is to help team make smarter decisions

Integrator

- Internal and external partner management
- Brand champion
- PR manager
- Marketing planning and budgeting
- Creative brief development
- Objective is to execute financial performance-supporting initiatives

Channel Manager

- Optimize and align channels to appropriate initiatives and targets
- Determine onboarding, customer communication and prospect vehicles
- Objective is to optimize communication effectiveness and efficiency

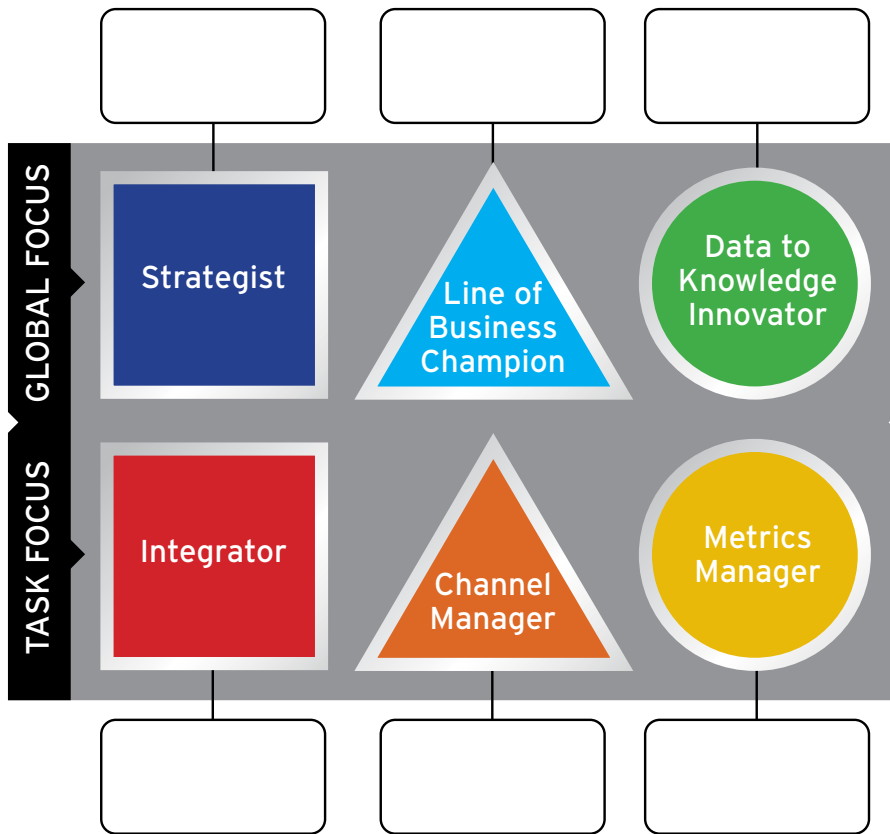
Metrics Manager

- Manage customer, product and relationship data; create dashboards and disseminate ramifications
- Monitor key activity
- Objective is to create, maintain and distribute marketing dashboard



2 Indicate the level at which each role is currently filled

Start where you are. Odds are, you're going to find some gaps in how some of these functions operate. Sit down with your CEO and HR, and decide how to get each function up to speed. Put a clock on getting them all fully functioning. This process can take 18-24 months to complete. Keep in mind, partnerships can help accelerate your timeframe short-term and give you time to see if you want to bring it in-house down the road.



Assessment scale with six empty boxes and colored markers:

- Blue square marker
- Blue triangle marker
- Green circle marker
- Red square marker
- Orange triangle marker
- Yellow circle marker

3 Rules of the Road

Be responsive and accountable to performance goals.

If the activity doesn't roll up to a goal, question why you're doing it!

Be strategy-driven; tactically supported.

Allocate resources for the strategies *before* the tactics!

Know your market, know your customers.

It's a gold mine if you do, and a dust bowl if you don't.

Align channels, messages and behaviors within your brand.

This discipline requires a To Do *and* a To Don't list!

Improve time-to-market.

Continuously. Relentlessly.

