YOUR FINANCIAL INFLUENCE PLAYBOOK

4 STEPS TO TURN FINANCIAL EDUCATION INTO MARKETING IMPACT

1. DEFINE TARGET COHORT

A defined group of people who share a life stage or financial tension

A COHORT MUST:

- **Share a common situation:** Would most people in this group be asking similar questions?
- **Have ongoing financial tension:** Can we outline 20-30 useful topics without forcing it?
- **Matter to the business:** Is this a must-win audience?

2. CREATE FOCUS STATEMENT

The role we are committed to playing for our target cohort

STATEMENT FORMULA:

For **[this cohort]**, we will consistently show up as **[role]**, helping them navigate **[financial context]**.

3. CHOOSE A MESSENGER

The authentic voice the cohort will trust and connect with

1. **IDENTIFY CANDIDATES**
   Look across your organization for people who already educate customers
2. **EVALUATE FIT**
   Assess how well each candidate aligns with the cohort and focus statement
3. **VALIDATE CHOICE**
   Are we confident in the choice?

4. BUILD OUT THE PROGRAM

The system that turns your cohort's questions into financial education

1. **SURFACE THE QUESTIONS**
   What is the cohort actually asking?
2. **ORGANIZE INTO PILLARS**
   Group these answers into durable themes
3. **BRING IT TO LIFE**
   Develop the format and rhythm
4. **MEASURE IMPACT**
   Track learning and trust, not just reach