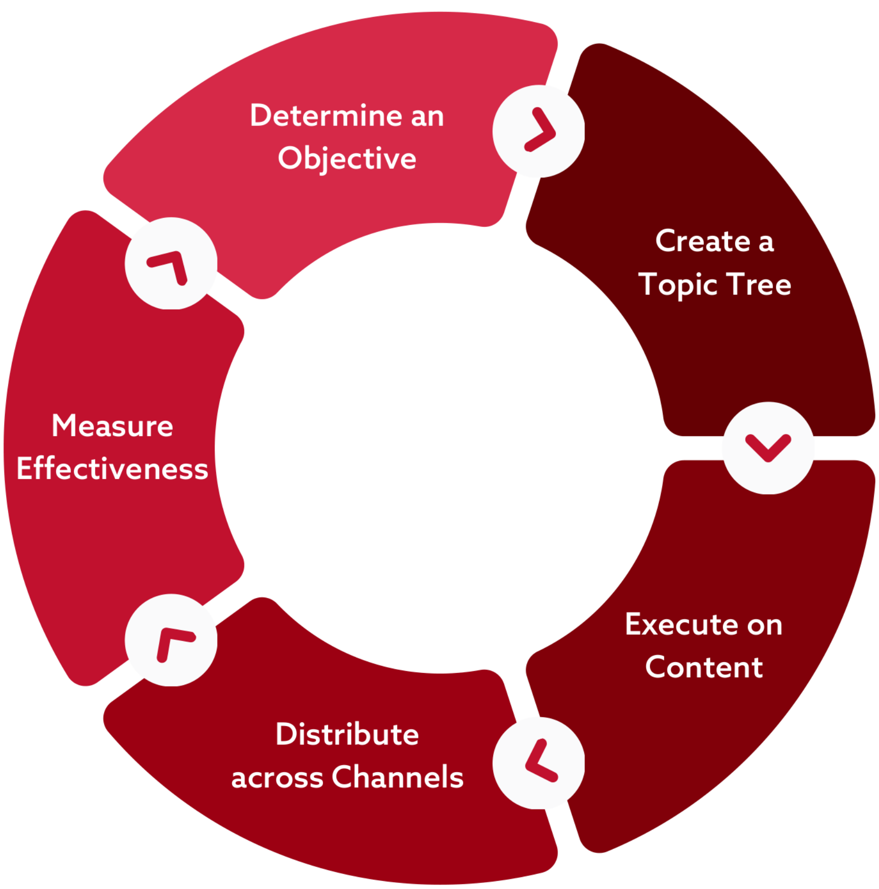
Social Assurance®

# How to Create Content around Strategic Initiatives

## Outcome-Based Topic Trees

Have you ever been tasked with achieving a big-picture outcome–growing deposits, increasing online account opens, or reaching a younger demographic–without knowing exactly how to go about getting there? A topic tree can help.

This content planning exercise can help sales and marketing teams create content in different formats and for different channels around a bigger-picture goal in a unified way. Keep in mind that each of the topics clustered around your outcome can become nearly any type of content: an informative blog, a storytelling piece, a social media post, a video, a case study, a customer interview, an employee interview, a webinar, a presentation, or something else. Clustering content around specific outcomes helps marketers tackle topics from multiple perspectives and angles, with different audiences and value propositions in mind. It also ties content together across your website and socials to ensure it is optimized for SEO and maximum reach.



# Outcome-Based Topic Trees

## Increase Deposits

- Commercial customer success story
- Personal banker employee highlight
- Informative content about CDs
- Customer quote from a long-time private banking client
- Savings account features and benefits
- Informative content about FDIC insurance
- Informative content about how interest rates work
- Customer quote from a long-standing commercial client
- Commercial lender spotlight
- Tips for retirement savings and planning

## Increase Commercial Lending

- Informative content about cross-collateralizing
- Investment property loan options
- Operationalizing accounts payable and receivable
- Case studies from scaled businesses
- Tips for navigating commercial real estate loans
- Financing options for small to medium enterprises (SMEs)
- Environmental, Social & Governance (ESG) financing
- Funding options after a seed round
- Impacts of market trends on commercial financing
- Commercial lender profiles/interviews

## Increase Mortgage Lending

- Informative content about down payments
- Mortgage lender spotlight
- Informative content about HELOCs
- How to remodel to increase home value
- Tips for first-time homebuyers
- Improving your credit score before buying a home
- Homebuyer success story
- Step-by-step on the home buying process
- Options for low- to moderate-income buyers
- Nonprofit initiative/partner spotlight (Ex: Habitat for Humanity)

## Increase Cross-Selling

- Financial wellness content series
- Customer spotlights
- Benchmark guide to financial wellbeing
- Financial literacy tips and information
- Auto loan dos and don’ts
- Tips for saving time with online banking
- Partner content with nonprofits
- Bundling benefits explained
- Financial health check tools and tips
- Savings and investment options

## Increase Small Business Lending

- Informative content about SBA loans
- Content about small business lending options
- Industry-specific case study
- Resources for entrepreneurs
- Informative piece about creating a business plan
- Common challenges of small business financing
- Leasing versus purchasing equipment and assets
- All about accessing and using working capital
- Limiting fraud risks for small businesses
- Offloading financial operational tasks to save time

# Outcome-Based Topic Trees

## Recruiting & Retention

- Leadership interview and spotlights
- A-day-in-the-life highlights
- Lender spotlights and interviews
- Storytelling around key employment benefits
- Celebratory retirement content
- Work anniversary content
- Nonprofit partner event coverage
- Specialized team spotlights
- New employee welcome
- Favorite customer interviews with longstanding employees

## Reach a Younger Demographic

- Basic personal finance tips and tricks
- Informative content about credit
- Tips for moving a business idea forward
- Interactive financial planning tools
- Partner content with schools and universities
- What to know about buy now pay later
- Financial tips for side hustlers
- Content about kids saving and investing
- Give back initiatives and community engagement
- Student spotlight

## Increase Treasury Management Services

- Case studies about customers saving time and resources
- Commercial business profiles
- Employee spotlights and interviews
- Fraud expert highlights
- Streamline operations with treasury management
- Fraud prevention tips and insights
- Tips for enhancing liquidity management
- 10 things businesses can easily outsource
- Industry-specific treasury management use cases
- Getting a handle on global payments

## Increase Business Accounts

- Customer success stories across industries and business types
- Commercial lender profiles
- Relationships with business groups and resources (e.g. chamber, start-up incubators, etc)
- Business and professional networking events
- Content about SBA loans
- Best practices for business insurance
- Treasury management services breakdown and impact content
- Major announcements from customers
- Involvement in customer gorwth initiatives
- Commercial real estate insights