

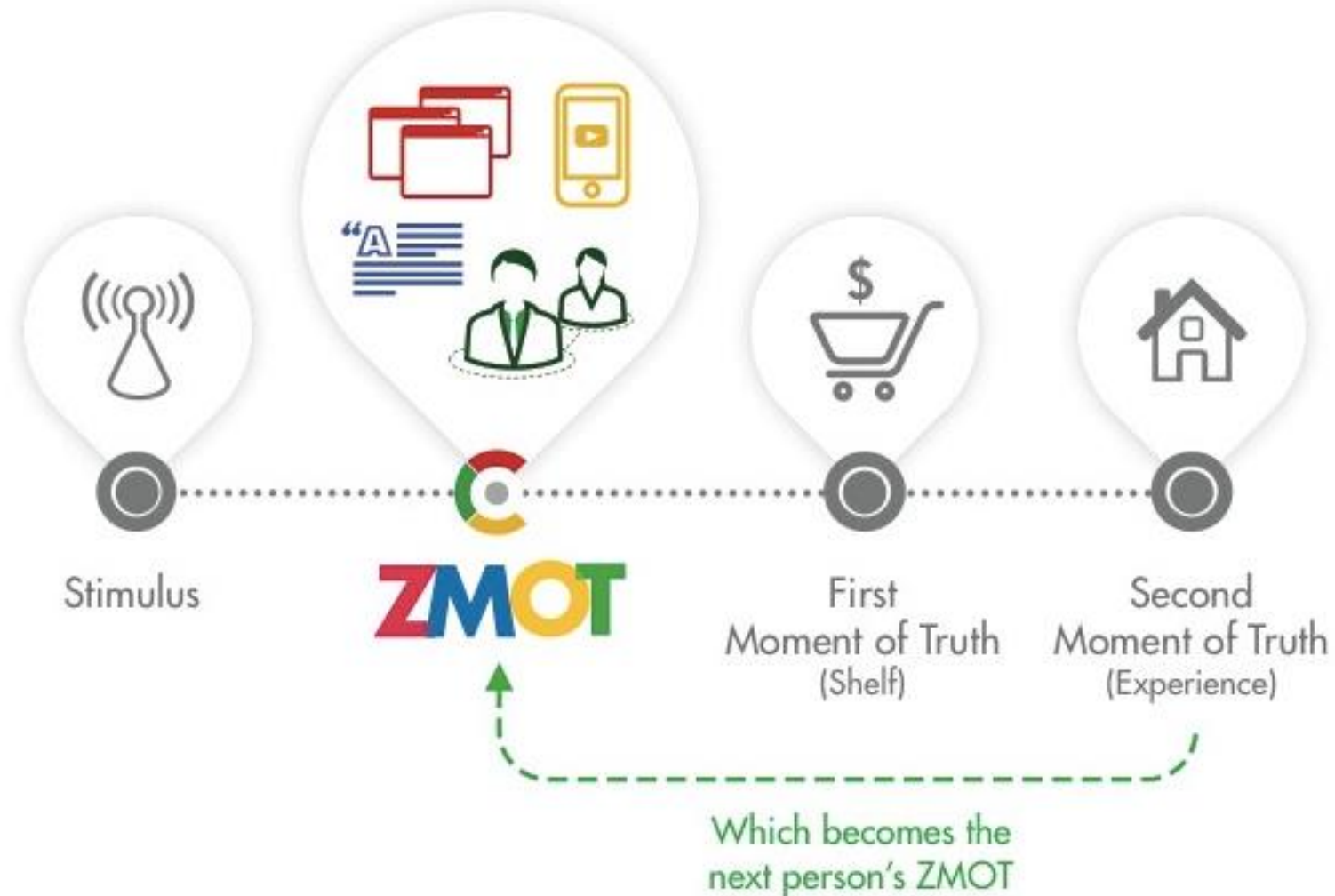


cl@b2015

# RELATIONSHIP ECONOMICS: A BRAVE NEW WORLD FOR FINANCIAL SERVICES



# NEW MENTAL MODEL OF MARKETING



# INFLUENCER SOURCES

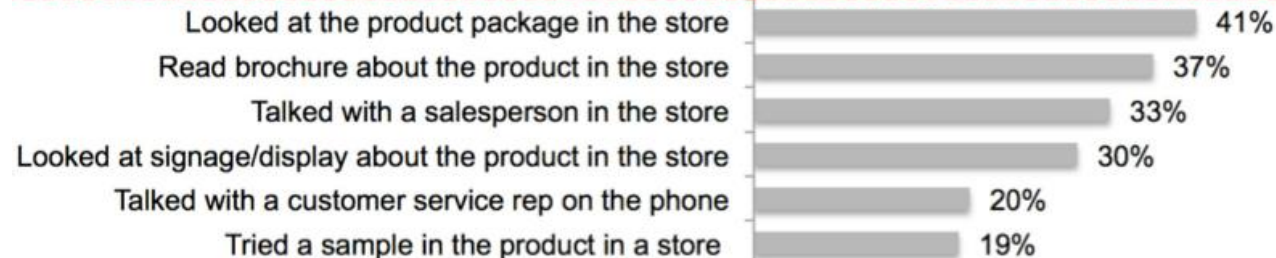
Stimulus



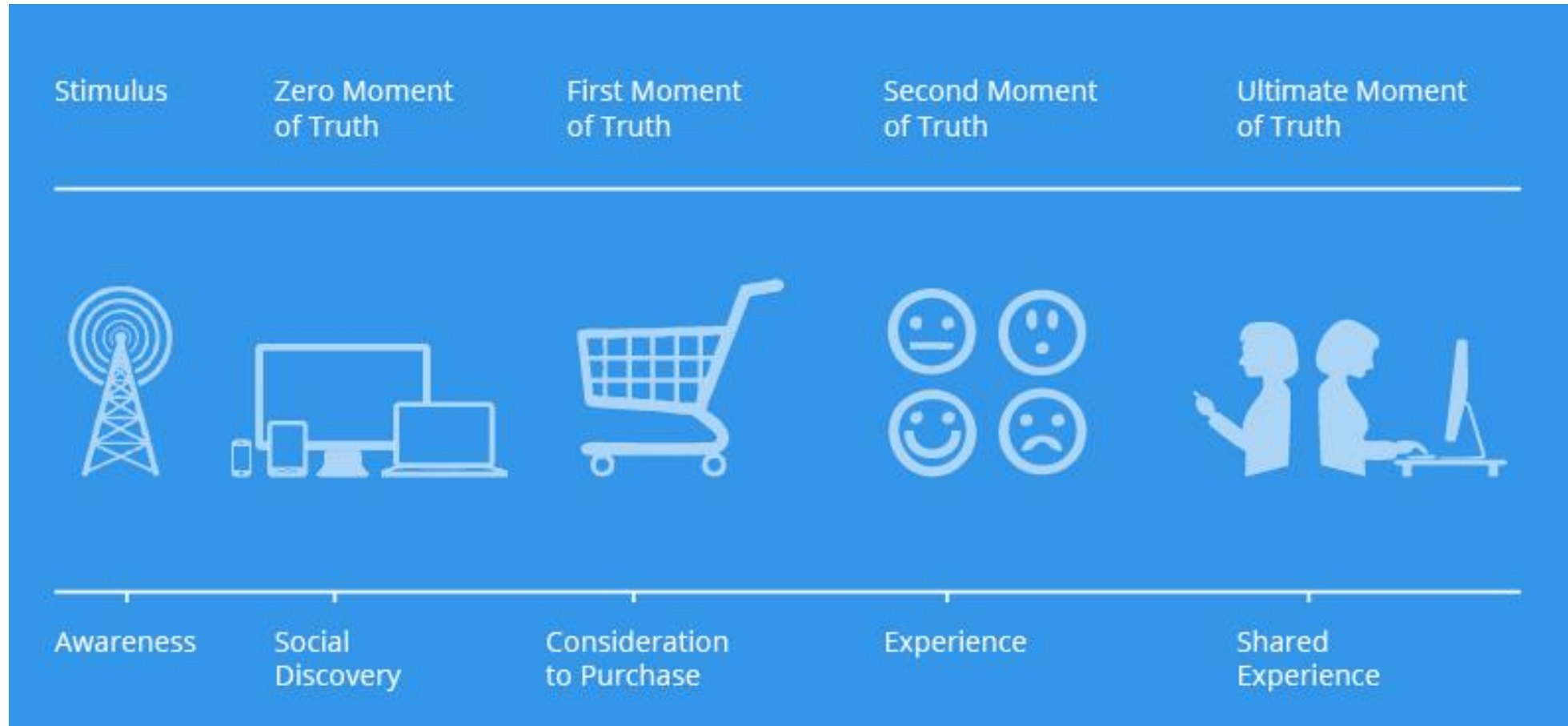
ZMOT



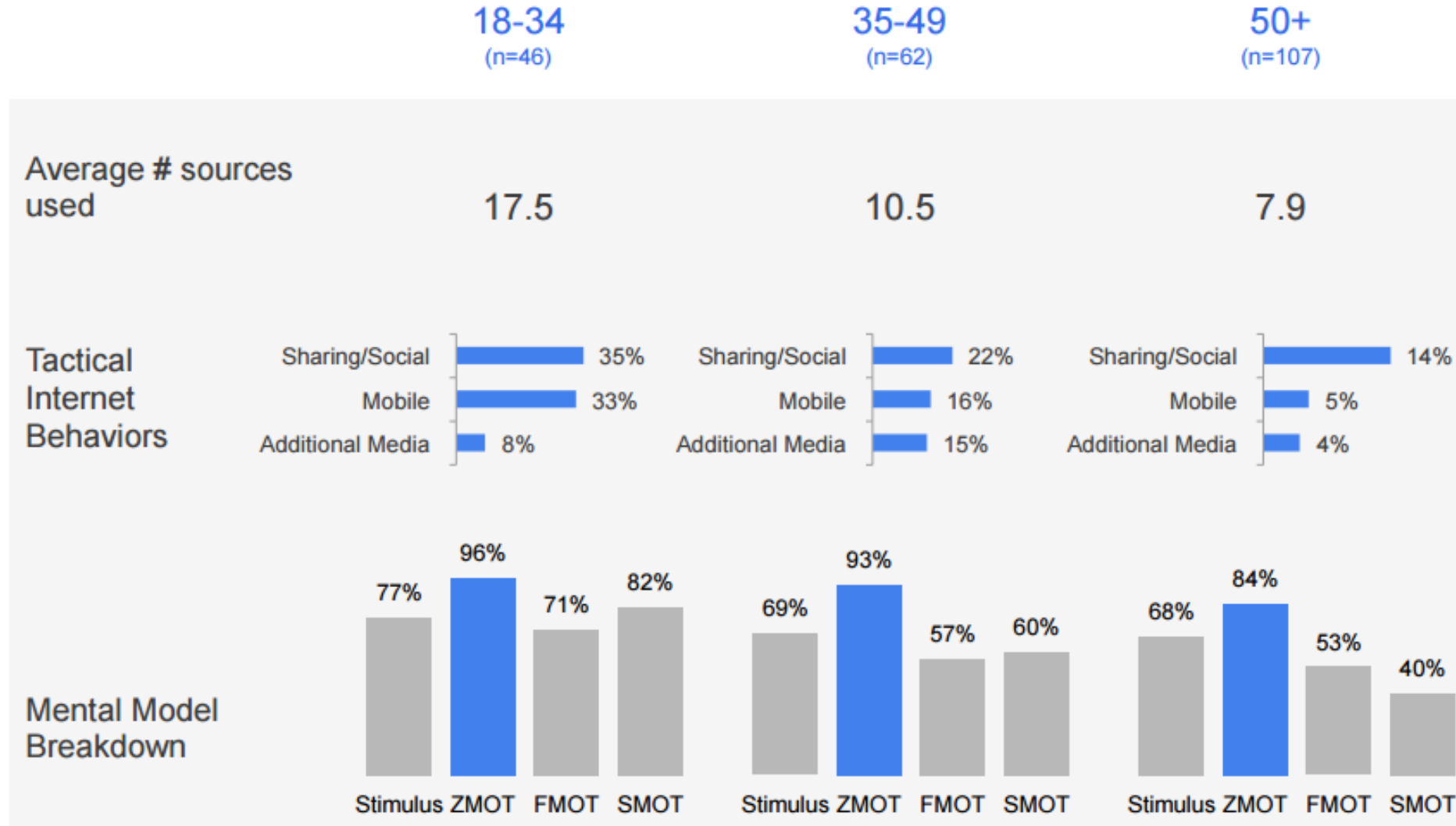
Moment of Truth



# NEW MENTAL MODEL OF MARKETING

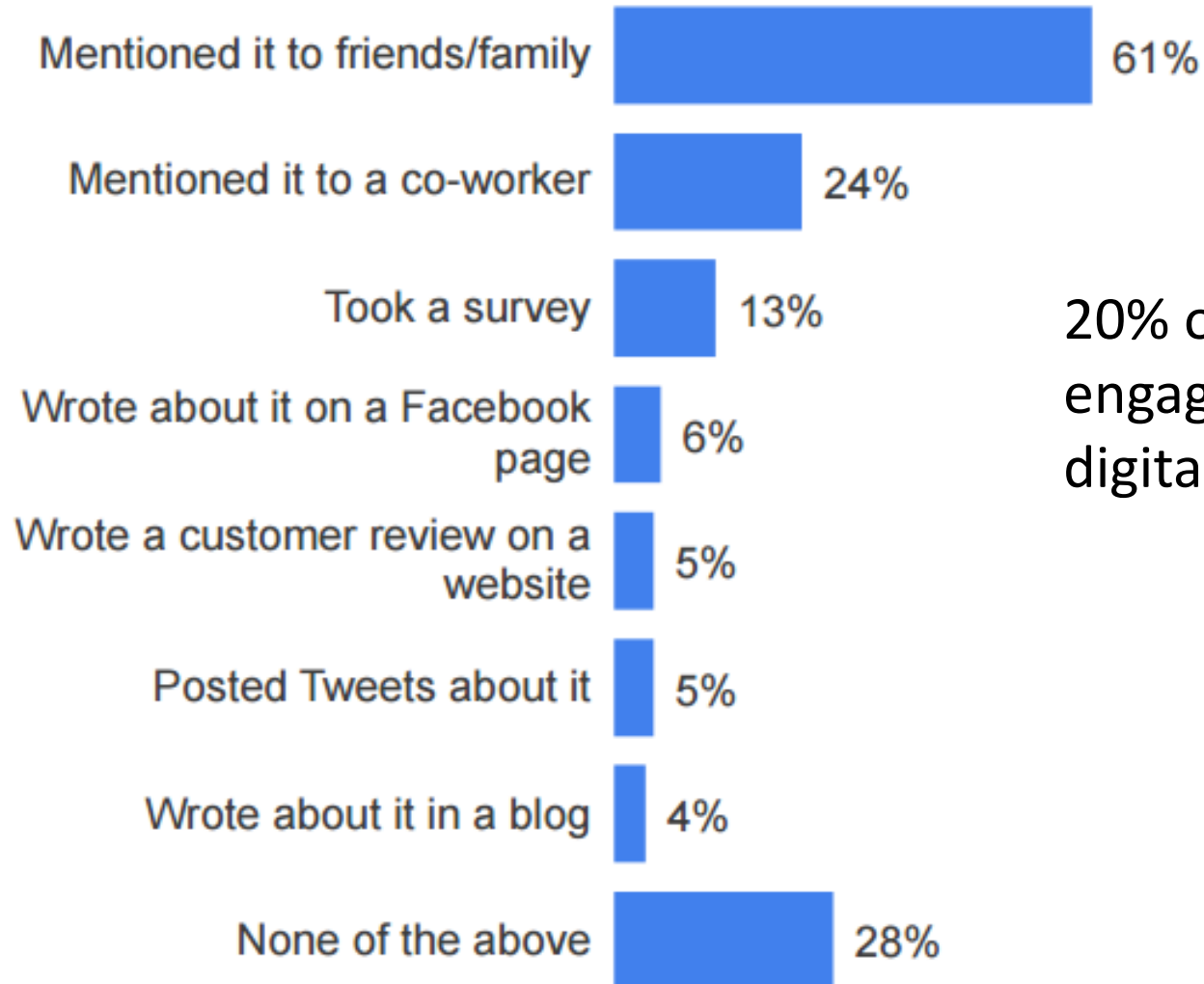


# MILLENNIALS ARE BELLWETHERS OF CHANGE



Consumers of financial services

# EMBRACE POST PURCHASE SHARING



20% of financial services consumers engaged in at least one form of digital sharing behavior

# CHANGES IN ADVERTISING MEDIA

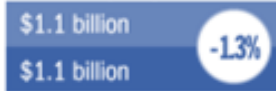
## Television



## Internet



## Newspapers



## Magazines



## Radio



## Outdoor



■ 2014  
■ 2013

Source: eMarketer © May 2015 The Financial Brand

\*All industries

# DIGITAL AD SPENDING

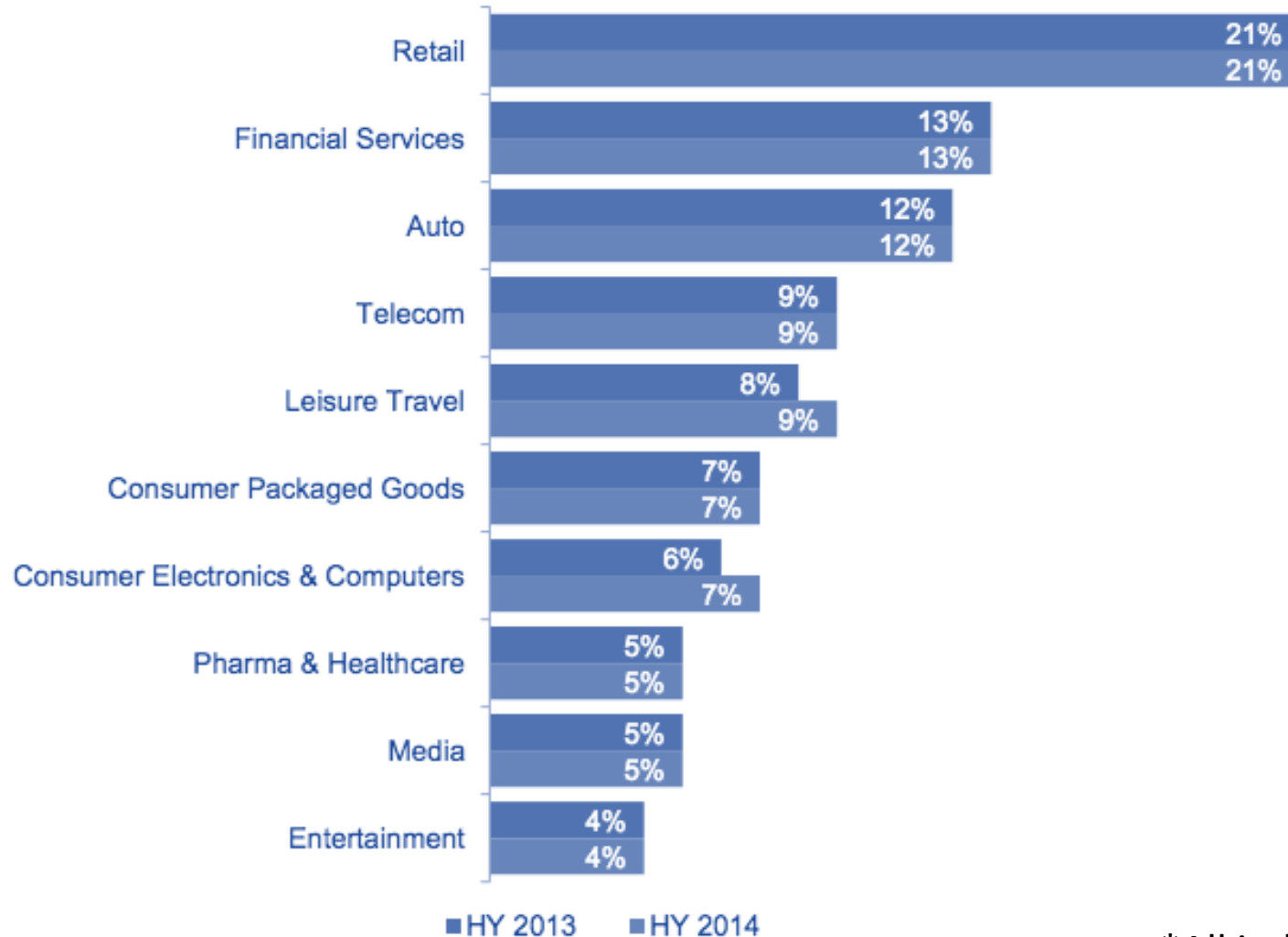


Source: eMarketer © May 2015 The Financial Brand

\*Financial Services Industry



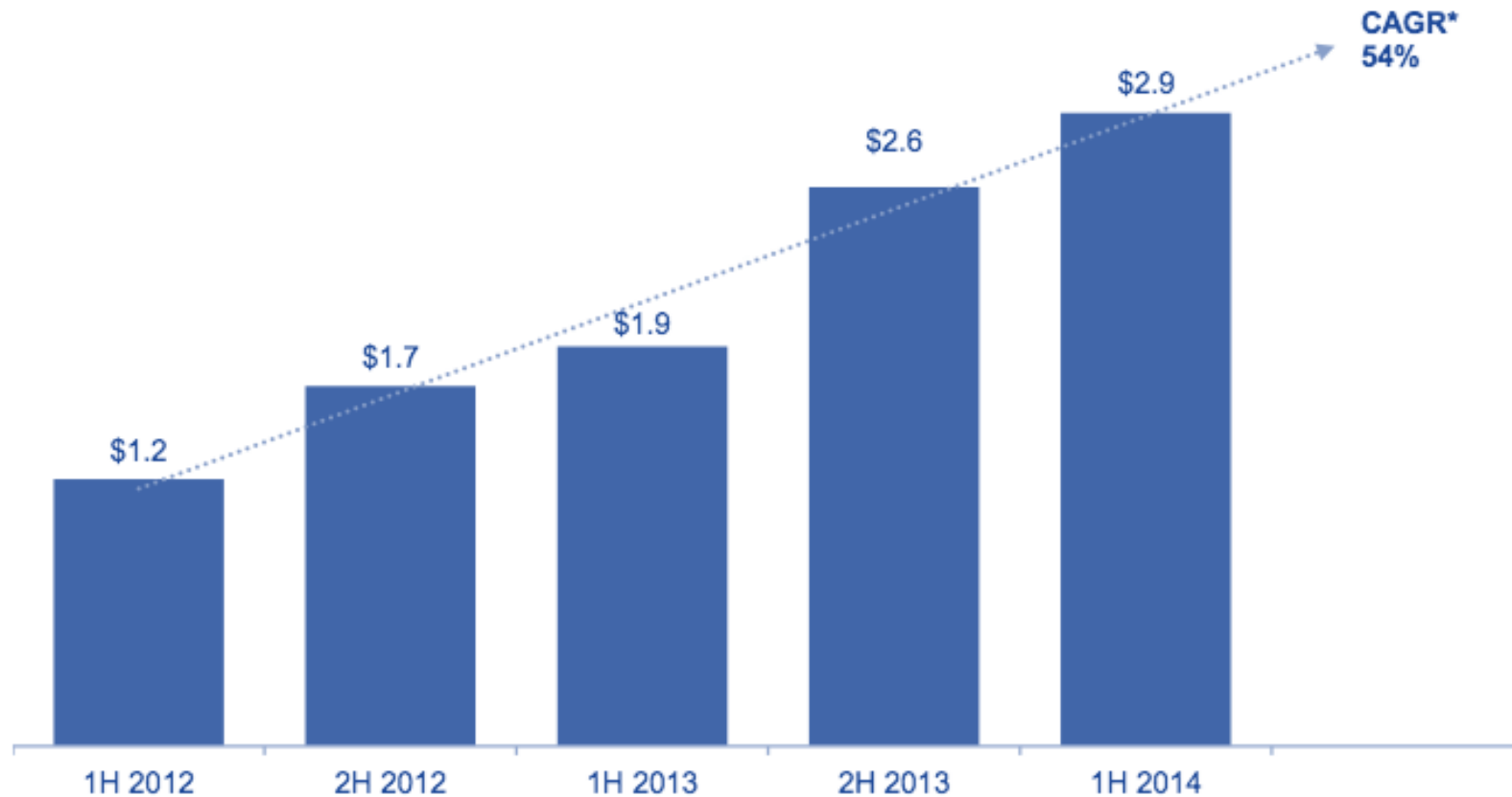
# INTERNET AD REVENUES BY INDUSTRY



Source: IAB/PwC Internet Ad Revenue Report, HY 2014

\*All industries

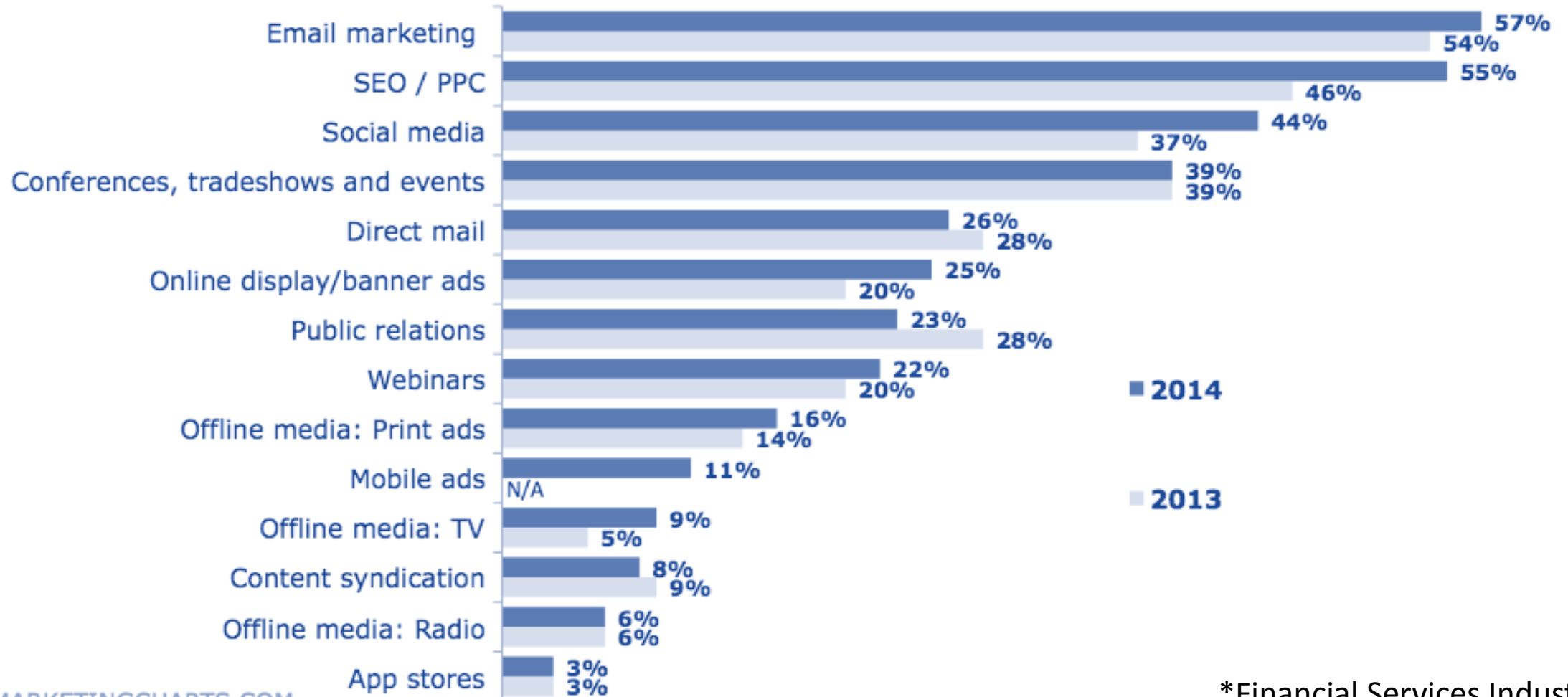
# SOCIAL MEDIA ADVERTISING SPEND



Source: IAB/PwC Internet Ad Revenue Report, HY 2014

\*All industries

# MOST EFFECTIVE CHANNELS FOR SOURCING HIGH-VALUE LEADS

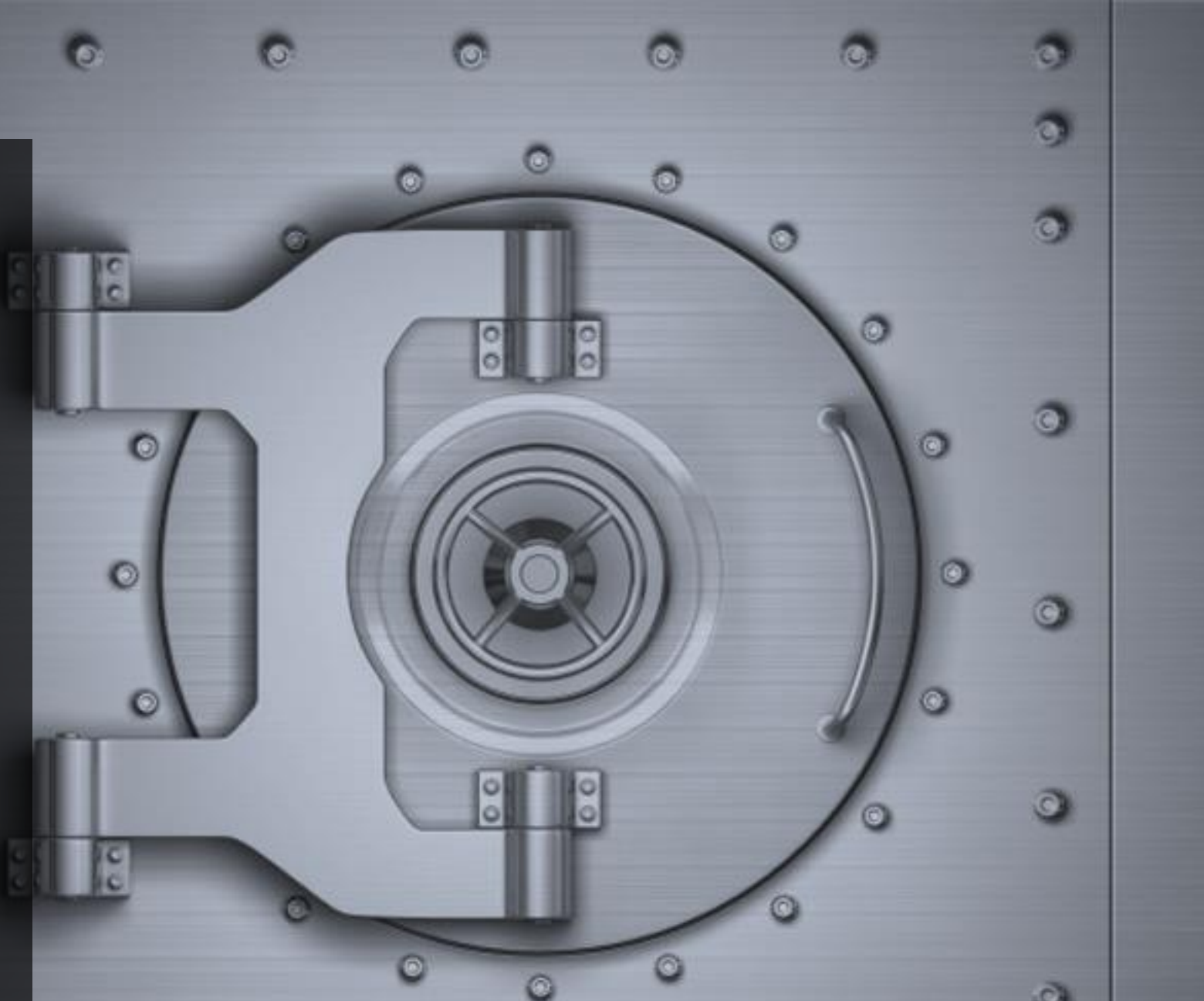


# Step I: Take Control

- Develop a strategy
- Access inventory
- Centralize ownership
- Safeguard security
- Create a formal social media policy

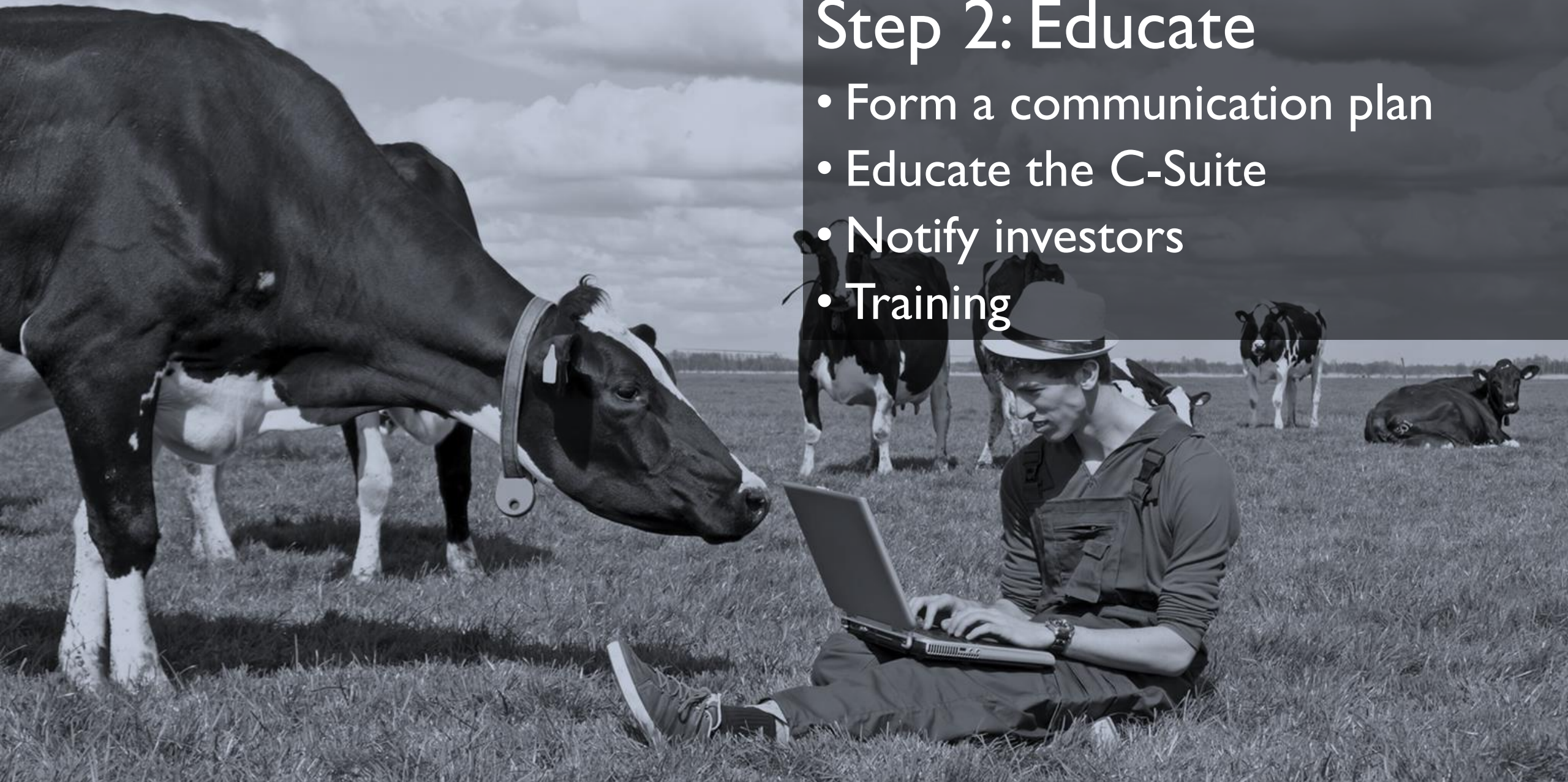
“It is only after the business has decided how it expects social media to benefit the firm that the legal team should weigh in with constraints to ensure everything is compliant.”

- Mike Langford, compliance strategist



## Step 2: Educate

- Form a communication plan
- Educate the C-Suite
- Notify investors
- Training



Have stuff written  
down so if the person  
responsible for social  
media gets hit by a  
bus, someone else can  
read the manual and  
figure it out  
- Jason Falls



## Step 3: Facilitate Connections

- Map your internal network
- Promote collaboration
- Invite people to your channels
- Recognize button-up/top-down

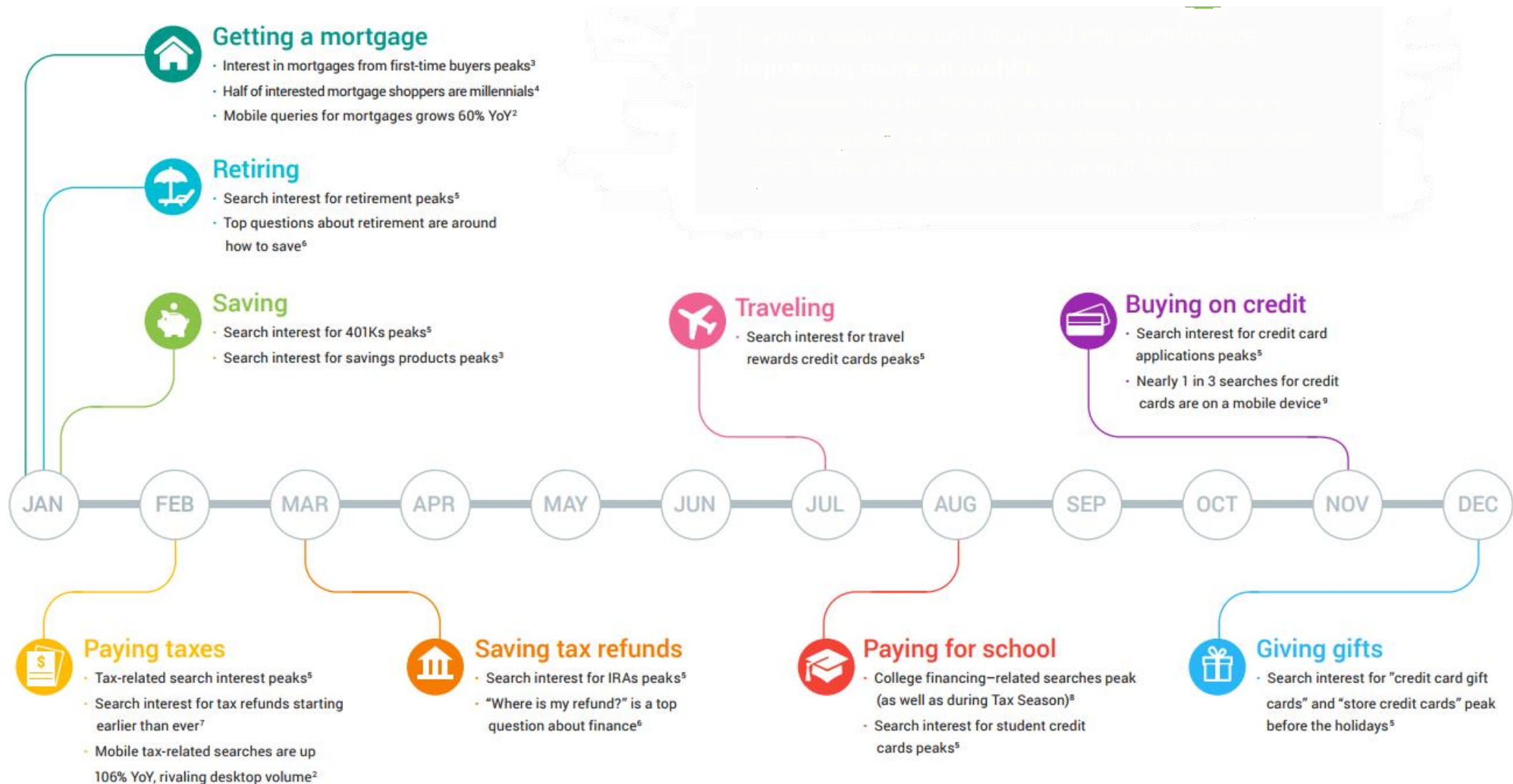



## Step 4: Listen to Your Customers

- Set up keyword streams
- Actively listen
- Monitor your competitors



# CREATE AN EDITORIAL CALENDAR





A “spray and pray” approach to social has about a 90% failure rate.



## Step 5: Serve your Customers

- Categorize, review and respond to complaints and inquiries
- Create a decision-tree and triage program
- Integrate social media with CRM

## Content That Works

- CSR
- Mediajacking
- RTM: Rapid response
- Real people and ambassadors
- Humanize your brand
- Branded/original content
- Contests
- Food/cats/dogs and babies




## Content That Doesn't Work


- Too much copy
- Big Asks
- Braggadocios content
- Too many sales offers
- Video in Facebook
- Canned responses



# The Good, the Bad and the Ugly

 **MasterCard**  
March 31 · 🌐

FINAL DAY to use your MasterCard for a chance to meet Gwen Stefani!  
Who loves #PricelessSurprises?  
Alternate forms of entry accepted.  
No Purchase Necessary. Void where prohibited. Open to US Cardholders 18+. PIN & International transactions ineligible.  
Ends 3/31/15. Restrictions apply. Click here for Official Rules and complete details: <http://mstr.cd/1OW5Mfr>.



572k Views

👍 Like    💬 Comment    ➦ Share

MasterCard and 1,949 others like this.    Most Relevant ▾

- Cool contest!
- What is the connection with Lyft?
- Can you limit the T&C's?

# The Good, the Bad and the Ugly



**#OccupyLA** @OccupyLA

@BofA\_Help @stevetimmis you can help by stop stealing people's houses!!!!

06 Jul

---



**Bank of America** ✓

@BofA\_Help

Follow

@OccupyLA We'd be happy to review your account with you to discuss any concerns. Please let us know if you need assistance. ^sa

9:09 PM - 6 Jul 2013

---

35 RETWEETS 18 FAVORITES

← ↻ ★

- Ojo! Be careful with this one.
- Set a meeting and take it offline.



# The Good, the Bad and the Ugly



**michael corrao** @michaelcorrao

8 mins

@AmericanExpress terrible service. 24 hr # on the back of my card says they are closed. And if my call is urgent, I am disconnected.

Expand



**American Express** @AmericanExpress

5 mins

@michaelcorrao Sorry to hear this. Looping in our @AskAmex team as they may be able to help. MB

Hide conversation Reply Retweet Favorite Buffer More

11:04 p.m. - Feb 26, 2013 from Manhattan, NY · Details

- Don't pass the buck!

## Step 6: Localize

- Listen locally/speak locally
- Empower local experts
- Target demographics
- Socialize your community outreach



## Step 7: Recruit and Retain

- Use social networks to establish your employer brand


“Companies in retail finance that have made the greatest use of social technology platforms to find candidates have reduced per-candidate costs by up to 40 percent.” - McKinsey Global Institute



## Step 8: Generate Actionable Data

- Define your goals and metrics
- Know when to amplify success
- Use social to guide decision making





What's the ROI of putting your pants on everyday? Its hard to measure, but there's negative consequences for not doing it.

- Some dude from For Motor Co.

# Heady Questions?



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