
a financial marketer's manifesto

I BELIEVE THAT CREATING VALUE WITH EVERY INTERACTION WILL MAKE FINANCIAL LIVES BETTER, DRIVE BALANCE SHEET RESULTS, AND MAKE THE BRAND STRONGER.

I BELIEVE IN CREATING VALUE IN THE COMMUNITIES THAT WE SERVE. PERIOD. I BELIEVE IN MAKING PEOPLE'S FINANCIAL LIVES FUNDAMENTALLY BETTER. I BELIEVE IN MAKING RELEVANT OFFERS, MAKING HONEST PROMISES, AND DELIVERING TO VALUE OUR MEMBERS. I BELIEVE LISTENING TO THE MEMBER IS MORE IMPORTANT THAN TALKING. I BELIEVE IN LEADING MARKETING STRATEGIES AND PROGRAMS THAT MATTER TO THE AUDIENCE. TO THE COMMUNITY. I BELIEVE IN THAT MEMBER FINANCIAL LITERACY HELPS OUR BOTTOM LINE. I BELIEVE IN BEING RELEVANT TO OUR CUSTOMERS AND MEMBERS IN WAYS THAT THEY LIVE THEIR DIGITAL LIVES. I BELIEVE THAT A DIGITAL FIRST STRATEGY IS FUNDAMENTAL AND NECESSARY TO OUR SUCCESS IN THE SHORT- AND LONG-RUN. I BELIEVE THAT THE TIME IS NOW TO DELIVER A PURPOSE-DRIVEN VALUE PROPOSITION — FOR BIG BANKS, CREDIT UNIONS AND COMMUNITY BANKS. I BELIEVE CREDIT UNIONS NEED TO LEARN FROM BANK MARKETING LEADERS AND VICE VERSA. I BELIEVE THAT FOCUSING ON JOURNEY MAPPING, STORY TELLING, WHILE USING PROVEN, DATA-BASED MARKETING STRATEGIES ARE HELPS US CREATE BETTER WAYS TO INCREASE MARKET SHARE AND SHARE OF WALLET. I BELIEVE WE MUST CREATE AND AUTHENTICALLY EXECUTE ON A RELEVANT PURPOSE-DRIVEN MISSION AND USE THAT AS A MEANS TO FOCUS DRIVING FINANCIAL PERFORMANCE. I BELIEVE A DELIVERING A DELIGHTFUL MEMBER EXPERIENCE LEADS TO MORE BUSINESS FROM THOSE MEMBERS AND EVEN MORE MEMBERS THAT WE CAN DELIGHT. I BELIEVE THAT WORD OF MOUTH MARKETING CREATES AN ENDLESS LOOP-OF-DELIGHT THAT LEADS TO EVEN MORE ENGAGED MEMBERS, AS WELL AS NEW MEMBERS. I BELIEVE THAT SOUND FINANCIAL PERFORMANCE IS NECESSARY TO BE ABLE TO EXECUTE ON OUR MISSION. I BELIEVE IN BEING RELEVANT TO OUR CUSTOMERS AND MEMBERS IN WAYS THAT THEY LIVE THEIR DIGITAL LIVES. I BELIEVE THAT A DIGITAL-FIRST STRATEGY AND MINDSET IS FUNDAMENTALLY NECESSARY TO OUR SUCCESS IN THE SHORT- AND LONG-RUN EVEN IF THE FINAL MEDIA USED IS TRADITIONAL. I BELIEVE THAT EVERY JOB HAS THE RIGHT TOOL — SOMETIMES DIGITAL SOMETIMES TRADITIONAL, ALWAYS MEASURABLE AGAINST THE STRATEGIC OBJECTIVE. I BELIEVE THAT A FOCUSED MARKETING VISION, STRATEGY, AND EXECUTION IS THE MOST STRATEGIC WAY WIN THE HEARTS AND MINDS OF OUR MEMBERS AND THEIR WALLETS. I BELIEVE OUR SUCCESS WILL LEAD US TO A PLACE WHERE IF YOU ASK SOMEBODY WHO LIVES IN A COMMUNITY THAT WE SERVE “WHO DO YOU BANK WITH?” THE ANSWER, EVIDENCED BY BEHAVIOR, WILL BE OUR FINANCIAL INSTITUTION. **I BELIEVE.**

G O I N

BUILDING BRAND & BALANCE SHEET

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