



# EMAIL MARKETING WORKSHOP

## WHY EMAIL MARKETING?

eMail is rapidly becoming one of the most powerful and cost effective marketing and customer service tools for financial service organizations (FSOs). Two key factors are driving this interest:

- 1) **Dramatic Response Rates:** Many FSOs have received eMail response rates in excess of 15% for most targeted campaigns, compared to 1% to 3% traditional direct mail.
- 2) **Personalized Customer Channel:** eMail marketing has played a critical role for leading FSOs like BankOne and Bank of America in their quest towards building personalized banking relationships and away from mass promotion of products and services.

## ABOUT THE EMAIL MARKETING WORKSHOP

The eMail Marketing Workshop is specifically designed for retail and commercial banks. The Workshop enables retail and commercial banks such as yours to create high-impact eMail campaigns while avoiding the pitfalls of this powerful medium. The eMail Marketing Workshop includes:

- ♦ A one day, hands-on workshop conducted with your team at your facility.
- ♦ eMail marketing experts walk your team through the critical steps of an eMail campaign.
- ♦ The Workshop is tailored to your credit union.
- ♦ A beginning-to-launch eMail marketing campaign roadmap.

## WHAT YOU CAN EXPECT

This interactive workshop will cover the critical elements needed to run a winning eMail marketing campaign from beginning-to-launch. The eMail Strategy Workshop provides checklists, samples, and two group exercises. Topics include:

### PERMISSION & THE LEGAL LANDSCAPE

- ♦ Understanding the risks of unsolicited marketing
- ♦ The permission spectrum: opt-out, opt-in, & the various degrees of each
- ♦ The legislative landscape as it relates to eMail & consumer data privacy

### ANATOMY OF AN EMAIL CAMPAIGN

- ♦ Defining objectives & strategy: retention, acquisition, & cross-sell
- ♦ Segmenting your recipients
- ♦ Understanding campaign development & planning from beginning to launch

(more >>>)

<b>THE WORLD OF EMAIL LISTS &amp; DATABASES</b> <ul style="list-style-type: none"> <li>♦ Targeting &amp; reaching your audience via eMail</li> <li>♦ Sourcing, pricing &amp; using external (rented) eMail lists</li> <li>♦ Collecting eMail addresses: building &amp; growing your in-house list</li> </ul>	<b>OFFER DEVELOPMENT &amp; MESSAGE CREATION</b> <ul style="list-style-type: none"> <li>♦ Developing an offer: best practices, eliciting response, basic do's &amp; don'ts</li> <li>♦ Message formats: text, HTML, AOL, &amp; rich media</li> <li>♦ Key message components: from line, subject line, body, footer, etc.</li> </ul>
<b>THE ART &amp; SCIENCE OF TESTING</b> <ul style="list-style-type: none"> <li>♦ Understanding what to test &amp; in what order</li> <li>♦ How testing works in eMail marketing</li> <li>♦ Developing a test matrix</li> <li>♦ Case studies &amp; examples</li> </ul>	<b>MANAGING &amp; MEASURING RESPONSE</b> <ul style="list-style-type: none"> <li>♦ Managing campaign response: unsubscribes, bounce-backs, &amp; other common errors</li> <li>♦ Important performance measurements</li> <li>♦ Tracking customer responses</li> </ul>
<b>HANDS-ON EXERCISES</b> <ul style="list-style-type: none"> <li>♦ When &amp; why to use eMail marketing</li> <li>♦ Planning an eMail marketing campaign</li> <li>♦ Calculating campaign results &amp; ROMI (return on marketing investment)</li> </ul>	<b>WHERE DO WE GO FROM HERE?</b> <ul style="list-style-type: none"> <li>♦ Actionable next steps &amp; roadmap for your organization's eMail marketing plan</li> </ul>

### EMAIL MARKETING WORKSHOP BENEFITS

Our eMail Marketing Workshop is customized for your needs and includes a detailed eMail marketing learning manual. Workshop benefits include:

- ♦ Essential ways to identify and pay special attention to your most valuable customers and those who represent the best opportunity for growth
- ♦ How to clearly measure, track and analyze the results of your online/e-mail marketing campaigns and initiative
- ♦ Proven effective strategies to integrate eMail into your customer marketing mix
- ♦ Compelling ways to calculate your eMail marketing ROI

### HOW THE EMAIL MARKETING DIFFERS FROM OTHER OFFERINGS

- ♦ We take a consultative approach specific to your credit union
- ♦ The Workshop includes industry best practices, hands-on exercises, and an action plan and eMail marketing roadmap developed specifically to meet your objectives
- ♦ We walk you through an entire eMail campaign step-by-step.

### Information >

### Ventus Solutions

Ventus Solutions is a professional consulting company that has helped many financial services organizations transform into customer-centric organizations. We have an experienced team of consultants with the deep financial services expertise necessary to design and execute effective customer relationship strategies and implement best of breed technology solutions for retail banks, credit unions and lenders. Some of our clients include:

- ♦ Financial Partners Credit Union
- ♦ Arrowhead Trust & Credit Union
- ♦ Bank of America Securities
- ♦ Safe Credit Union
- ♦ GreenPoint Mortgage Funding
- ♦ Bank One

For more information about our solutions, clients and industry perspectives, please visit our website at [www.VentusSolutions.com](http://www.VentusSolutions.com).