

COVER SHEET FOR HOME STUDY PROBLEM  
SOUTH CAROLINA BANKERS SCHOOL

FIRST-YEAR CLASS -- 2022 School Session

HOME STUDY PROBLEM III

Based on Lectures in **MARKETING TODAY**

Instructor **Mrs. Ann-Stanton C. Gore**

Submitted by: Name \_\_\_\_\_

Bank \_\_\_\_\_

Bank's Mailing Address \_\_\_\_\_

\_\_\_\_\_  
ZIP CODE

List the other members of your class with whom you worked in preparing this solution:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I certify that this home study problem is my original work and that all writings by any other person, business, or organization, including my own bank, have been carefully documented. I have not shared my completed work with any other SCBS student nor have I read the completed work of any other students.

Signature: \_\_\_\_\_

Due Date **February 8, 2023**

Date Submitted \_\_\_\_\_

Date SCBS Received \_\_\_\_\_

Date Returned to Student \_\_\_\_\_

ATTENTION STUDENT: UPLOAD TO SCBA's PORTAL OR MAIL HOME STUDY PROBLEM TO:

South Carolina Bankers School  
Post Office Box 1483  
Columbia, S.C. 29202

OR EXPRESS/REGISTERED MAIL TO: 2009 Park Street, Columbia, SC 29201

## Marketing Today

### Home Study Assignment

The goal of this home study assignment is to identify a marketing solution for your bank or organization. As our industry grows and fintech disruption continues, neo banks, personalized products and solutions, making our unique style of banking (your points of differentiation) less obvious.

In order to ensure profitability and remain competitive, a well thought out strategy and detailed plan is crucial for your bank. The goal of this assignment is for you to develop a professional marketing plan that will increase your bank's success. Select a product, service, or area where you would like to drive improvement. This could be increasing digital adoption, closing more commercial loans, becoming the Best Place to Work, attracting new deposit accounts, increasing client retention or increasing brand awareness.

The primary emphasis of this project is how you follow the process to create a specific, systematic marketing strategy and plan. The products, services, or opportunities you choose for improvement do not drive the grade. The assignment will be evaluated based on the quality and soundness of your plan, including your ability to analyze the situation and develop your marketing strategy.

Your strategic marketing plan should contain the following components. If a component is not relevant, explain why.

**I. Executive Summary**

*Meet with your leader. Discuss the project and identify an area that the leader/banks wants you to focus on. Briefly outline your recommendation and a summary of the costs, profits/benefits to the bank, and timeline.*

Start the Comprehensive Marketing Plan.

**II. Identify the Goals**

*Clearly outline what you are marketing and what you hope to achieve. Establish realistic and measureable goals.*

**III. Conduct the audit, research, analyze**

- a. Take an inventory of your bank's previous initiatives pertaining to your recommendation and goals.*
- b. Market summary - Discuss the recent trends in your area. Identify the areas you are focusing on and the process you used to identify the opportunity. Talk about the banking landscape and the role your solution will play.*
- c. Complete a SWOT.*
- d. What support and resources are needed to be successful. Assess the competition and analyze your community and audience.*

**IV. Identify target audience**

*What specific groups are you targeting, clearly define them and create personas.*

**V. Marketing strategy**

- a. Briefly address all the “Ps of Marketing”*
- b. Write a value proposition*
- c. Determine your key brand message*
- d. Outline the advertising tactics and strategies that will be deployed (tradition, digital, social, client engagement, etc.)*

**VI. Determine budget & financials**

- a. Come up with a marketing budget.*
- b. Conduct a breakeven analysis.*
- c. Forecast your goals and the costs associated with achieving them.*

**VII. Implementation timeline**

- a. Outline the milestones, critical activities, and timeframes for implementing your plan.*
- b. How long will it take to get started? To get the first lead? To get the first conversion?*
- c. What does success look like in the early and latter stages?*
- d. Account for contingencies.*

**VIII. Evaluation**

- a. Outline how you will monitor and evaluate results. What are you KPIs?*
- b. How frequently will you review your plan and measure the results.*
- c. Outline your contingency plans.*

Feel free to reach out with questions:

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