

TOOL

9

Creating a Marketing Campaign

Gerardo Morales

Readers can use the following tables to create and evaluate their own local marketing campaigns. The first table sets out 60 actions for creating an effective marketing campaign. In the next table, readers can evaluate their existing and potential strategies for creating a promotional campaign in their local markets, drawing on the 60 actions set out in the first table. Lastly, readers can use the pie chart to determine the promotional mix used in their own institutions.

60 ACTIONS FOR CREATING AN EFFECTIVE LOCAL MARKETING CAMPAIGN

PUBLICITY

- | | |
|--|--|
| <input type="checkbox"/> Local radio | <input type="checkbox"/> Monitors with advertisements |
| <input type="checkbox"/> Promotional banners | <input type="checkbox"/> Local newspapers |
| <input type="checkbox"/> Signs in commercial areas | <input type="checkbox"/> Publicity in special supplements |
| <input type="checkbox"/> Traveling megaphone announcements | <input type="checkbox"/> Internet web page |
| <input type="checkbox"/> Distribution of product brochures | <input type="checkbox"/> Stickers for cars |
| <input type="checkbox"/> Dispensers with brochures | <input type="checkbox"/> Calendars at the end of the year |
| <input type="checkbox"/> Local T. V. | <input type="checkbox"/> Lighted signs on building |
| <input type="checkbox"/> National T. V. | <input type="checkbox"/> Publicity items: hats, pens, key chains |
| <input type="checkbox"/> Billboards | <input type="checkbox"/> Publicity in public buildings, schools, sports centers, local markets |
| <input type="checkbox"/> Signs for people passing by | |

SALES PROMOTION

- | | |
|--|--|
| <input type="checkbox"/> Raffles with special prizes, according to the savings category | <input type="checkbox"/> Information stands at events with large numbers in attendance |
| <input type="checkbox"/> Raffles for account opening | <input type="checkbox"/> Raffles in educational centers |
| <input type="checkbox"/> Advertisements on special days: Teacher's, Secretary's, Mother's, Father's, Christmas | <input type="checkbox"/> "Lightning" promotion of 1 day |
| <input type="checkbox"/> Informative events in areas far from the points of service | <input type="checkbox"/> Menu of services in customer service areas |
| <input type="checkbox"/> Meetings with special clients | <input type="checkbox"/> Children's Club |
| | <input type="checkbox"/> Raffles with instant prize |
| | <input type="checkbox"/> Scratch-off coupons with instant prizes |

PUBLIC RELATIONS

- | | |
|---|--|
| <input type="checkbox"/> Sponsoring of local events: your own fair, socio-cultural events | <input type="checkbox"/> Sporting events, co-sponsoring with leading brands of other industries |
| <input type="checkbox"/> Sending birthday cards to special clients, local opinion leaders | <input type="checkbox"/> Support for educational centers that promote the children/youth savings program |

INDIVIDUAL AND GROUP SALES

- | | |
|---|---|
| <input type="checkbox"/> Selection and training of business promoters | <input type="checkbox"/> Intensive sales |
| <input type="checkbox"/> Sales to current clients | <input type="checkbox"/> Portfolio of services for salespeople |
| <input type="checkbox"/> Sales to potential clients | <input type="checkbox"/> Objectives manual for salespeople |
| <input type="checkbox"/> Sales to inactive clients | <input type="checkbox"/> Business cards for promoters |
| <input type="checkbox"/> Marketing to organized groups with potential for saving | <input type="checkbox"/> Letters to parents with youth savers |
| <input type="checkbox"/> Group marketing according to affinity: homemakers, merchants | <input type="checkbox"/> Cross-marketing of services: savings, loans, insurance |
| | <input type="checkbox"/> Selective contact by e-mail |
| | <input type="checkbox"/> Telemarketing |

CUSTOMER SERVICE / CONTACT PERSONNEL

- | | |
|--|---|
| <input type="checkbox"/> Personnel focused on customer service | <input type="checkbox"/> Comfortable environment for customer service: air conditioning, cold and hot water, coffee, well-lit space |
| <input type="checkbox"/> Uniformed, motivated, and well-trained personnel | <input type="checkbox"/> Competitive hours of service |
| <input type="checkbox"/> Bilingual personnel as appropriate | <input type="checkbox"/> Create a "special service window" |
| <input type="checkbox"/> Offering candy and other items in the customer service area | <input type="checkbox"/> Service on holidays |
| <input type="checkbox"/> Clean and orderly image of the customer service area | <input type="checkbox"/> Opening of home collection accounts |
| | <input type="checkbox"/> Anticipated marketing on fixed-term accounts before they mature |

MY STRATEGIES FOR CREATING AN EFFECTIVE MARKETING CAMPAIGN

INSTRUCTIONS: Assuming the role of marketing director of your institution, select the actions from the 60 actions listed on the previous page that you would consider most appropriate to develop and penetrate your local market.

PUBLICITY

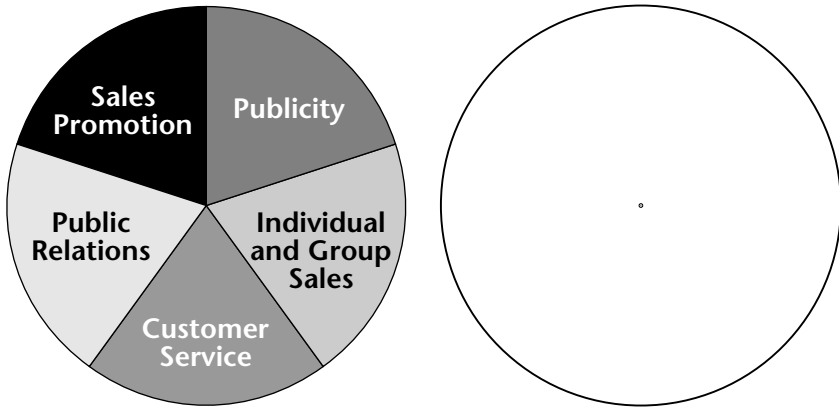
SALES PROMOTION

PUBLIC RELATIONS

INDIVIDUAL AND GROUP SALES

CUSTOMER SERVICE / CONTACT PERSONNEL

WHAT IS THE PROMOTIONAL MIX IN MY INSTITUTION?



INSTRUCTIONS: Classify the marketing activities performed in your institution, according to what you learned as you completed the worksheet.

Indicate the make-up of your promotional mix, expressed in terms of estimated percentages that total 100%.