

Marketing Vision Guide & Workbook

Uncover your strengths, identify opportunities, and use time-tested exercises for understanding your clients.

Honing Your Vision

AIMING FOR THE BULLSEYE

Vivid goals make for sharper and more successful strategies. It's easier to aim and hit a red bullseye than it is to aim for an abstract or poorly defined target.

Finding Your Business Purpose

Use the diagram below to determine your business purpose, the ultimate goal for communicating the "why" behind your business.



WHAT YOU LOVE

The foundational passion that motivated you to start your business.

WHAT YOU CAN BE PAID FOR

The thing you do that can command a price and deliver benefits.

WHAT YOU ARE GOOD AT

What you do exceptionally or differently.

WHAT THE WORLD NEEDS

The thing you do that can command a price and deliver benefits.

How Can Knowing Your Purpose Help?

Defining your core motivations and desired outcomes can give you and your business a clearer sense of purpose. You might also use your purpose to develop a unique selling proposition or to drive identifiable messaging for your brand. Use the space below to write out your thoughts.



WHAT DO YOU LOVE DOING?



WHAT ARE YOU PAID FOR?



WHAT ARE YOU GOOD AT?



WHAT DOES THE WORLD NEED?

SUMMARIZE YOUR PURPOSE IN A FEW SENTENCES

An Honest Self-Appraisal

IDENTIFY YOUR STRENGTHS & WEAKNESSES

Now that you know who you are and where you're going, it's time to tally your advantages and challenges. A SWOT Analysis is a strategic planning tool focused on your strengths, weaknesses, opportunities, and threats. It's a great way to look at your business and marketing holistically.

Complete Your SWOT Analysis

Use the space below to work through each item in the SWOT Analysis.



YOUR STRENGTHS

What your business does well (e.g., strong brand, loyal customers)

- ▶
- ▶
- ▶
- ▶
- ▶



YOUR WEAKNESSES

Areas that need work (e.g., limited budget, outdated technology)

- ▶
- ▶
- ▶
- ▶
- ▶



YOUR OPPORTUNITIES

External factors you can leverage (e.g., market growth, emerging trends)

- ▶
- ▶
- ▶
- ▶
- ▶



YOUR THREATS

Potential obstacles to success (e.g., new competitors, regulatory changes)

- ▶
- ▶
- ▶
- ▶
- ▶

Analyze Your SWOT Results

The information developed in your SWOT Analysis can help you hone a competitive advantage, overcome your weaknesses, & anticipate the greatest threats.

Take Some Time to Interpret Your Results in the Space Below

HOW CAN YOU LEVERAGE YOUR STRENGTHS?

HOW CAN YOU OVERCOME YOUR WEAKNESSES?

HOW CAN YOU MAXIMIZE OPPORTUNITIES?

HOW CAN YOU MINIMIZE THREATS?

Understand Your Customers

KNOW YOUR AUDIENCE

Now that you know yourself and your company a little better, it's time to focus on the people you serve. It helps to think of our customers along certain lines (or segments). These segments have to do with who they are, how they behave, and how they think.

DEMOGRAPHIC SEGMENTATION

Use variables like age, gender, income level, and marital status to understand the needs of your customers.



BEHAVIORAL SEGMENTATION

The way our customers engage with our products and services today can help us anticipate future behavior.



PSYCHOGRAPHIC SEGMENTATION

Enter the mind of your customer by considering their personality, interests, values, and preferred lifestyles.



SAMPLE PERSONA



Name:	Sarah Johnson
Age:	38
Marital Status:	Married with Two Children
Occupation:	Elementary School Teacher
Income:	\$65,000
Education:	4 Year College - Bachelor's Degree

NEEDS

Automated bill pay and mobile banking to fit her busy lifestyle.

WANTS

A reliable savings plan for her children's college fund.

FEARS

Concerned if they are saving enough for their children's future.

SOLUTIONS

Provide online tips and tools for budgets, savings & bill pay.

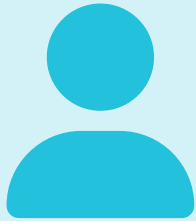
ACTIONS

Meet with a financial advisor for long-term strategy options.

Create Your Customer Personas

Information is powerful, even when it's the product of imagination. Use your experience to create stand-ins for your likely customers.

CUSTOMER 1



Name:

Age:

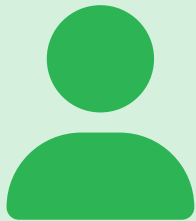
Marital Status:

Occupation:

Income:

Education:

CUSTOMER 2



Name:

Age:

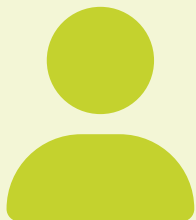
Marital Status:

Occupation:

Income:

Education:

CUSTOMER 3



Name:

Age:

Marital Status:

Occupation:

Income:

Education:

Analyze Your Customer Personas

Dive Into the Mentality of Your Personas

Use what you discover to inform your overall go-to-market and marketing strategy. Align their desires and concerns with the solutions that only your financial institution can offer. Finally, define the actions you want them to take to guide them toward financial success while supporting your business goals.

	CUSTOMER 1	CUSTOMER 2	CUSTOMER 3
WANTS/DESIRES What exactly do these customers want from your industry?			
NEEDS What service or product does your customer actually need?			
FEARS What fears or hesitations might the customer have about your services?			
SOLUTIONS How can your services or products solve the customer's problem?			
DESIRED ACTIONS As a result, what action do you want your customers to take?			

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