



**REAP THE REWARDS OF OUR FINANCIAL MARKETING EXPERTISE.**



**Bluetooth  
Creative**

## HOW CAN I OVERCOME TODAY'S FINANCIAL MARKETING OBSTACLES?

### TODAYS' COMMUNITY BANKS AND CREDIT UNIONS FACE A UNIQUE SET OF CHALLENGES. WE LOVE CHALLENGES.

This isn't your parents' banking. Today the demand is for convenience, performance and personal service. Community banks and credit unions need to make sure their marketing efforts engage their targets.

#### Challenges:

- Increased Banking Choices
- Reduced Customer Finances
- Shrinking Profit Margins
- Changing Customer Behavior
- New Non-branch Technologies
- Alternative Financing Options





## WHERE IS THE INFORMATION I NEED TO MAKE SOUND MARKETING DECISIONS?

### EFFECTIVE FINANCIAL MARKETING IS BUILT ON RESEARCHED “REASONS WHY.” BLUETOOTH’S GOT ‘EM.

Every Bluetooth recommendation is fully supported by data and facts garnered from the most relevant and timely resources. We’re a member of the 4A’s, and are able to reference proprietary information unavailable to non-member agencies.

**Only 4% of U.S. agencies are members, able to meet 4A-qualifying standards.**

#### Research Data Categories:

- Credit Unions
- Community Banks
- Industry Trends/Forecasts
- Regional Demographics
- Customer Profiles
- Employee Empowerment
- Internet/Mobile/Social
- Community Relations
- Small Business Initiatives
- Challenges/Competition
- Financial Innovations
- Technology Innovations
- Regulations/Legislation
- Economic Environment



## MY FINANCIAL MARKETING PARTNER SHOULD BE FULL-SERVICE.

### FULL-SERVICE MEANS JUST THAT. BLUETOOTH DOES IT ALL.

#### Services:

- Advertising and Marketing
- Strategic Planning
- Industry and Competitive Research
- Media Planning/Buying
- Event Production
- Interactive
- Social Media
- Branding and Corporate Identity
- Weekly/Monthly/Quarterly Progress Reports
- Constant Program Assessment
- Total Program Maintenance
- Content/Media Refreshment as the Market Evolves
- Ongoing Recommendations for Efficient Budget Spending



## HOW CAN YOU HELP IMPROVE MY COMMUNITY RELATIONS PERCEPTION / INVOLVEMENT?

**CREDIT UNIONS AND COMMUNITY BANKS DON'T JUST NEED TO ENGAGE THE COMMUNITY, THEY NEED TO PROUDLY SUPPORT IT.**

- Sponsored Community Events
- Charity Participation
- Community Public Relations
- Building on Business Through Leadership
- Putting People First



## WE'RE A PEOPLE BUSINESS. HOW CAN WE CONNECT MORE?

**REACHING EVERY CUSTOMER IS THE WAY TO GROW YOUR DEPOSITOR BASE AND MEET THEIR FINANCIAL NEEDS. TIME TO GET SOCIAL.**

- Twitter
- Facebook
- Mobile
- Foursquare
- Google+
- Blogs
- LinkedIn
- Yelp
- YouTube
- Connect Measurement
- Network Aggregation
- Bookmarking
- Analytics
- Automation



## HOW DO I EMPOWER MY EMPLOYEES AND TEAM MEMBERS?

### **YOUR PERSONNEL POOL IS YOUR STRONGEST ASSET. LET THEM KNOW IT.**

Your employees are an integral part of your customer-facing profile, and the engine that makes your business successful. Help them value you as much as you value them.

- Employee of the Month Program
- POP Utilizing Employees
- Continuing Education Sponsorship
- Employee Competition Incentives
- Meaningful Employee Promotion Programs
- Employee Booster Events



## HOW CAN I MAXIMIZE MY MARKETING TO SMALL BUSINESSES?

### SMALL BUSINESS ACCOUNTS NEED TO KNOW THEY ARE BIG BUSINESS TO YOU.

Community banks and credit unions are community-centric by definition. Serving small companies is one of your biggest opportunities to form strong partnerships with regional businesses. You need to alert owners and CFOs about your advantages and how you can help them meet their goals by presenting past, small-business success stories.





# WHAT MARKETING INITIATIVES ARE RIGHT FOR MY FINANCIAL ENTERPRISE?

## TRADITIONAL MARKETING

- Print
- Broadcast
- Direct Mail
- Collateral
- POP Materials
- Outdoor
- Event
- PR
- Guerilla

## SOCIAL MEDIA

- Blogs/Microblogs (Twitter)
- Content Communities (YouTube)
- Collaborative Projects (Wikipedia)
- Social Networking (Facebook)

## DIGITAL MARKETING

- Custom-designed Websites
- Organic, Industry Leading SEO and SEM
- Online/Banner Advertising
- Email Marketing
- Mobile Marketing
- Pay-Per-Click Programs
- Online Brand Management

## BRANDING

- Corporate ID
- Positioning
- Customer Promise
- Personality
- Graphic Theme
- Tone



## WHAT'S HAPPENING RIGHT NOW IN FINANCIAL MARKETING THAT I SHOULD KNOW ABOUT?

### THE ROLE OF FINANCIAL MARKETING IS CONSTANTLY EVOLVING. WE'RE ALWAYS AHEAD OF THE CURVE.

That's because, as the area's premier financial marketing agency, we keep abreast of every aspect of banking news in the tri-state area. We know what's happening day to day with customers and institutions alike, and what are the most effective marketing programs. We're always ready to give you proactive insight and actionable advice specific to your banking business.



## MY FINANCIAL MARKETING PARTNER SHOULD HAVE YEARS OF EXPERIENCE.

### FINANCIAL MARKETING EXPERIENCE IS HARD-WON. HOW ABOUT A THIRD OF A CENTURY?

With over 35 years of successful, customized bank and credit union marketing solutions under our belt, Bluetooth Creative Group is uniquely qualified to empower your financial enterprise for real success.

- Experienced in both regional and national markets
- Worked with a wide range of retail banking clients
- Well versed in emerging technologies and advanced media
- A long history of award-winning, sales-sparking creative
- Exceptional expertise in Bank / Credit Union branding, and how best to position your business



## EXACTLY HOW WILL BLUETOOTH MARKETING ENRICH MY BANK'S FUTURE?

**WE'RE ALREADY THINKING ABOUT YOUR BUSINESS.  
GIVE US A CALL, WE'LL TELL YOU OUR THOUGHTS.**

You'll be speaking directly with Steven Ehrlich and members of his trusted team.  
516.766.0600

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