

# Reaching Your Customer in a Digital World

August 19  
1-2PM ET

 **ELFA**  
WEDNESDAY  
EBINARS@1

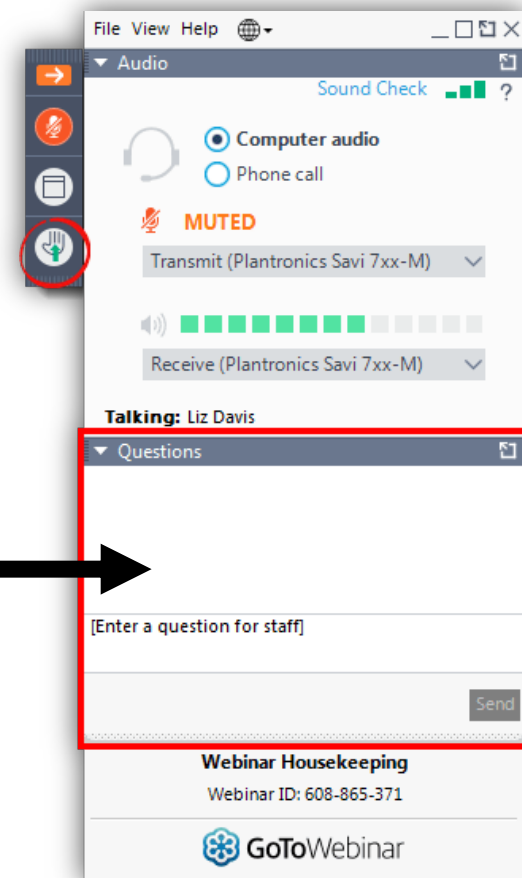


# Housekeeping



Today's web seminar is being recorded.

All questions should be submitted via the Questions Panel. →



# Moderator



## **Brittney Weber**

Chair, ELFA Communications Committee  
VP, Direct Marketing Manager Senior  
Huntington National Bank

# Speakers

**Monica Bruegl**

*Marketing Consultant*

**Katy Ellquist**

*Senior Global Content Strategist &  
Marketing Consultant*

Caterpillar Financial Services Corporation

**Heather S. Friedman**

*Vice President Corporate Marketing*  
GreatAmerica Financial Services



# Today's Topics



1. Introduction to Omni-Channel Marketing



2. Content Marketing Made Easy



3. LinkedIn Case Study

# Intro to Omni-Channel Marketing & the Journey Map

## Did You Know?

65% Start on Smartphone



4% Continue on a Tablet



61% Continue on a PC/Laptop

25% Start on PC/Laptop



19% Continue on a Smartphone



5% Continue on a Tablet

11% Start on Tablet



10% Continue on a PC/Laptop

Source: <https://deviceatlas.com>

## Agenda:

- How an omni-channel approach can impact results
- Review evolution of marketing strategies
- Effective use of a client journey map to support omni-channel initiatives

*“The customer experience is the next competitive battleground.”*

*– Jerry Gregoire*

# Why Companies Care About Omni-Channel Marketing



**13%**

Increase in the sale  
amount



**90%**

Higher client retention  
rate



**250%**

Increase in frequency to  
purchase

Nearly 50% of companies indicated the client experience is a top priority with only 21% responding that price was a top priority.

# Evolution of Marketing Strategies

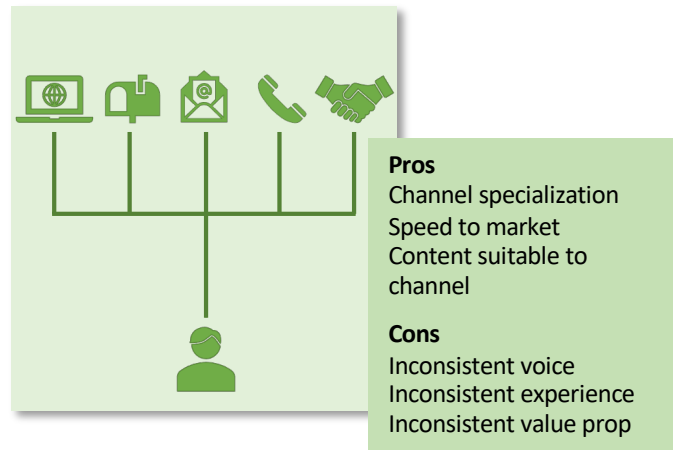
## Single Channel

Clients experience your brand via one key touch-point / channel.



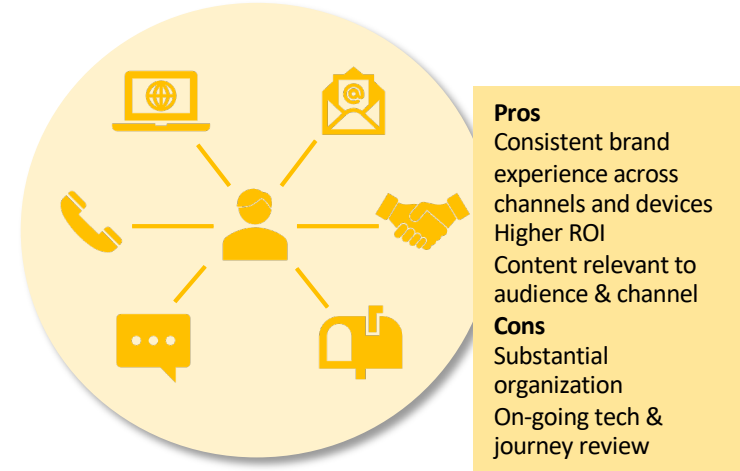
## Multi-Channel

Clients experience your brand via multiple touch-points. Each is a different channel experience.



## Omi-Channel Experience

Clients experience your brand via multiple touch-points providing a consistent experience. (Not a separate channel experience.)



**Omni-channel:** Seamless experience regardless of channel or device. An experience synchronization that is relevant to the audience.

**Get started or enhance existing model: Use a client journey map**

# The Power of a Journey Map

## Why now?

COVID: Business process and tech use affected - mapping helps ensure changes are understood and leveraged. Example: People using personal cell phones even more during working hours as a work tool.

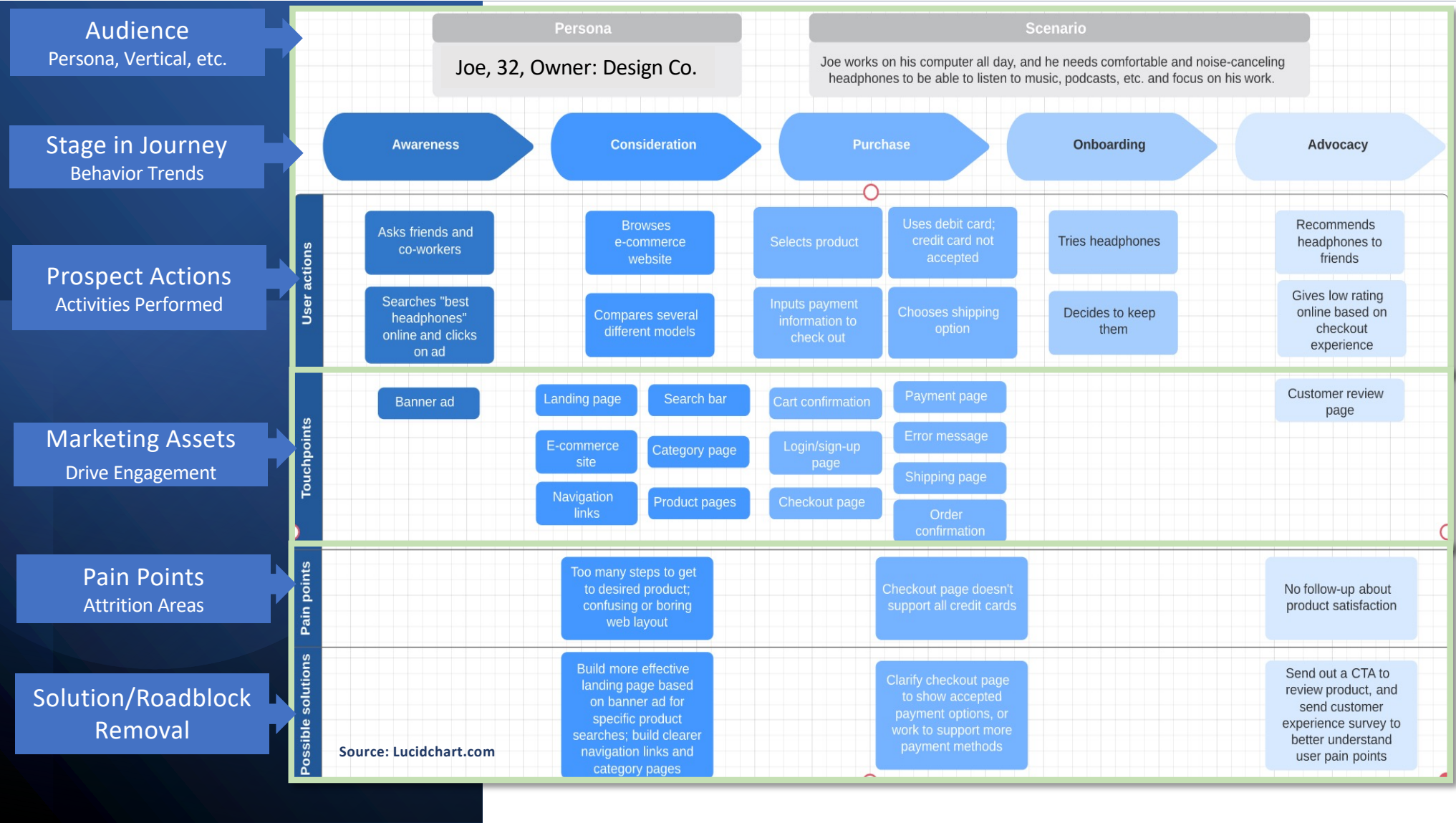
## Who should do a journey map?

- ✓ If you've never done one or have only partial purview
- ✓ If it's been over 2 years since a refresh was completed
- ✓ If your company's or your clients' processes changed



*“In a world where products and services are becoming more and more commoditized, customer experience is the only true differentiator.”*

*– Annette Franz*



# Speed Round! Top 10 Mapping Tips



1. **Prospects vs repeat clients:** Typically, the journey is very different. Companies forget to map both.



2. **Unique products:** Consider finance products that create a different journey ex. titled vehicles.



3. **Vendor, broker/lessor programs:** How does the client journey start & transition with referral or lending sources and back again.



4. **Surveys:** Can you leverage your own OR think of asking referral partners to incorporate financing experience question if they survey clients too.



5. **“Wow” moments:** Use pain point/solution of mapping to address attrition AND find ways to pleasantly surprise clients. Ex. Approved for more than requested.

6. **Forgotten ‘clients’:** Don’t forget that your equip. vendors, brokers/lessors are your clients too – map onboarding and financing process.
7. **Repeat clients:** One of our most important assets – you may want to start your mapping with this audience.
8. **Hands-on:** Mapping is an active process not just a white board task. Make calls into the dept. your clients do - how easy is it to reach a human. What does vm sound like?
9. **Collections:** Don’t forget about this process. How you treat a client with 1 past due over their contract duration matters.
10. **Invoicing:** Remember to make these value added too!

# Summary - Don't Get Overwhelmed

## Think Big. Start Small.

- Experience through the eyes of your clients
- Coordinate experience across channels
- Anticipate clients move among channels
- Expect multiple devices to be used

Client journey mapping **traditional & online** channels

Determine which channels clients are using most & **on what device(s)**

Meet your clients where they are - **focus on the key channels** your clients use

Develop **appropriate content** for the channel & key device(s)

**Experiment & test** to deliver an experience that differentiates your company



Tip: Make content relevant to the marketing channel. Examples: Influencer videos (testimonials) do well on YouTube and long content does well for blogs or e-newsletters.



# Wrap-Up

**Question  
&  
Answer**

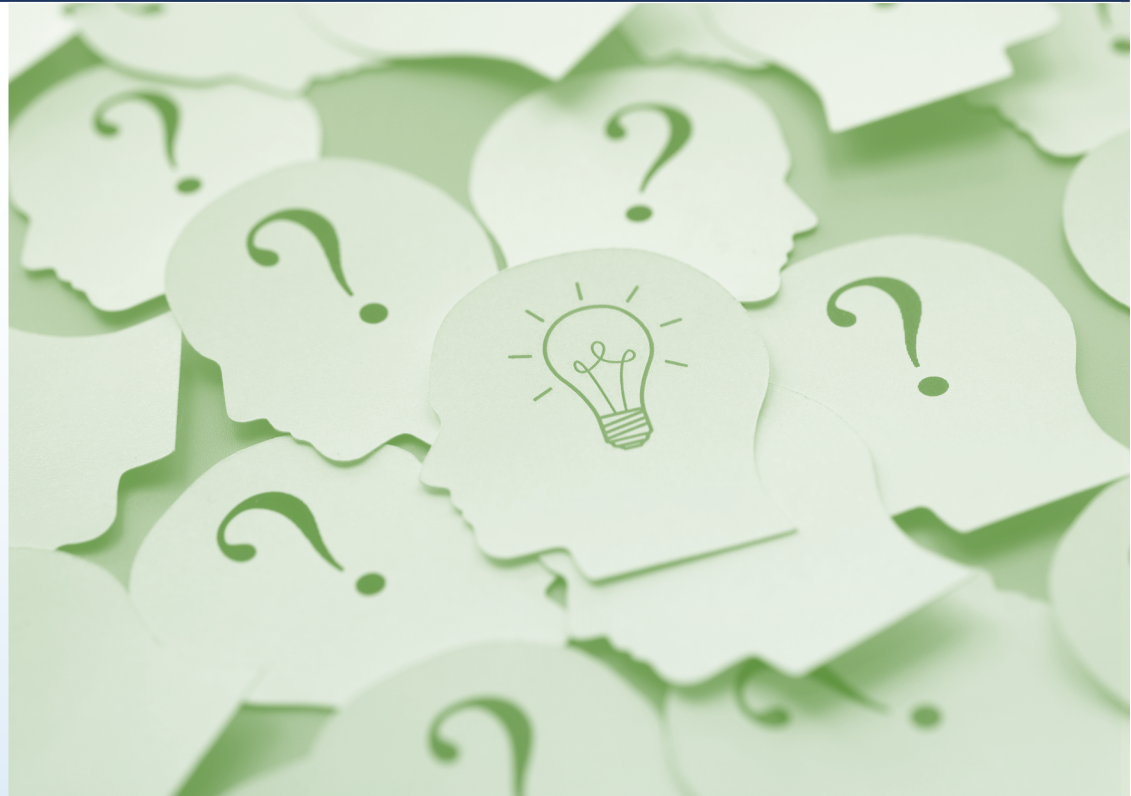


Image source: Aspiration Marketing

# CONTENT MARKETING



# Content Marketing | Agenda

- > The Basics
- > Getting Started
- > Strategy
- > Implementation
- > Content Promotion

# Content Marketing | The Basics

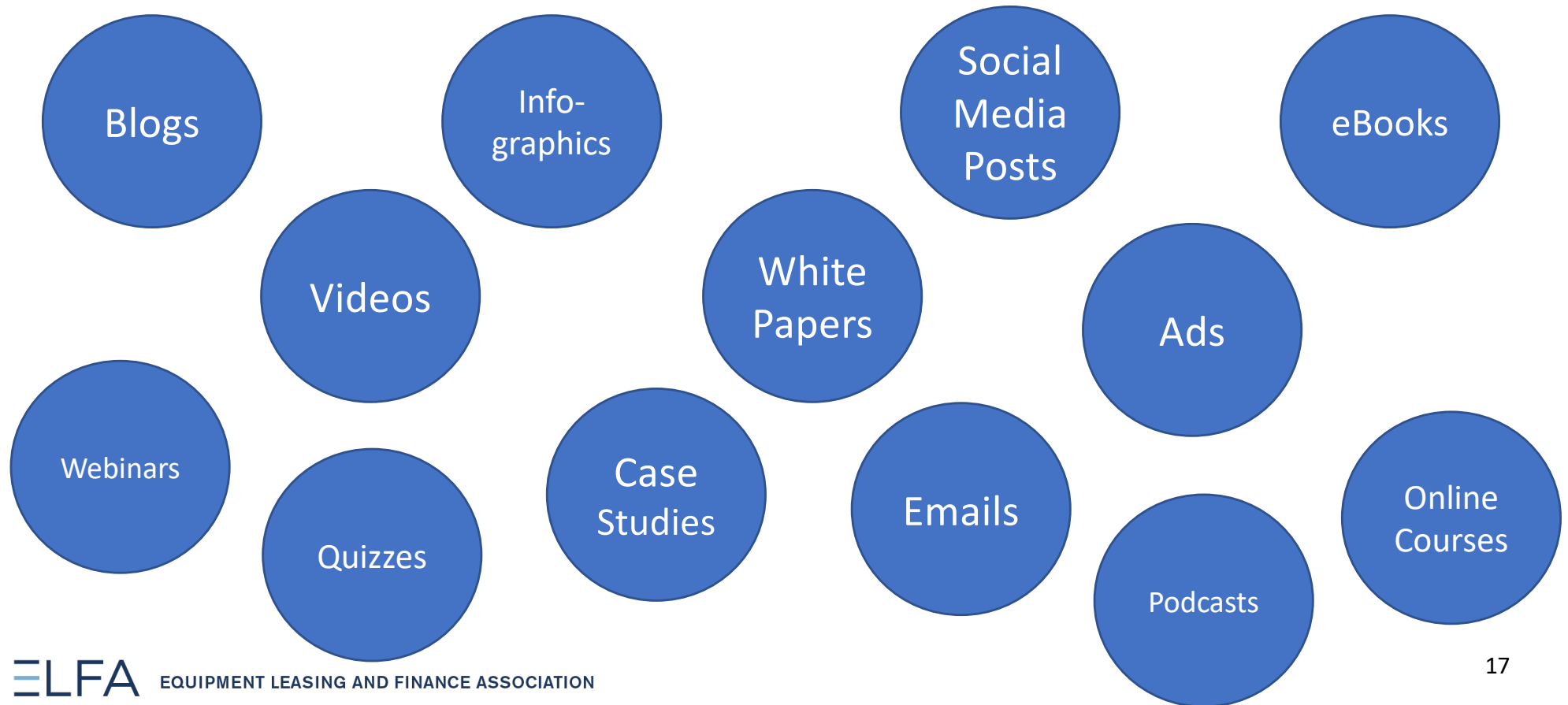
## What is Content Marketing?

*Planning, creating, and sharing valuable content for your target audience in order to achieve a business goal.*

## Benefits of Content Marketing

- Lead generation & nurturing
- Web traffic
- Better search ranking
- Industry authority / trust / expertise
- Awareness
- Establish brand voice
- Social media following and engagement

# Content Marketing | Types





# Content Marketing | Types

## Apple Podcasts Preview



15 episodes

Presented by  
partners  
is guided  
Kristina  
of guest



## We're leaning into the menu classics that McDonald's customers crave most



People are passionate about our food. They love our gr love knowing they can enjoy their favorites at any McD Big Mac, Quarter Pounder, Cheeseburger – these iconic heart of our business and what our customers return t That's why we're training our focus on the menu items customers, while still innovating in ways that riff on Mc (more on that later).

### BUDGETING TIPS

Discover helpful advice for your small business budgeting needs. From how to track expenses to how to manage cash flow, we've got you covered. Visit [smallbizbooks.com](#) for more tips and tricks.

#### AVERAGE NET WORTH OLD VS YOUNG AMERICANS

Age Group	1997	2020
65 AND OVER	\$123,456	\$123,789
35 AND YOUNGER	\$19,876	\$5,678

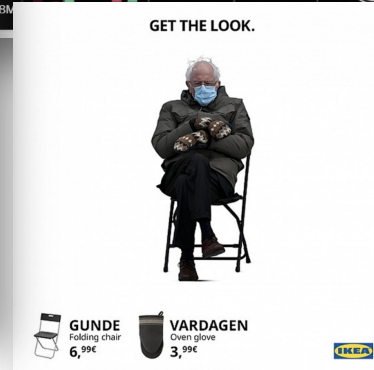
TOTAL U.S. REVOLVING DEBT AS OF JANUARY 2020: \$100 BILLION

42% OF SMALL BUSINESS ADMIT USING THEIR CREDIT CARD TO MAKE ENDS MEET

### TIPS TO BUDGETING

- PREPARE A PLAN**: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed neque elit, consectetur adipiscing elit. Sed neque elit, consectetur adipiscing elit.
- PAY DOWN BAD DEBT**: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed neque elit, consectetur adipiscing elit. Sed neque elit, consectetur adipiscing elit.
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- USE COUPONS**: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed neque elit, consectetur adipiscing elit. Sed neque elit, consectetur adipiscing elit.
- CUT DOWN EXPENSIVE HABITS**: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed neque elit, consectetur adipiscing elit. Sed neque elit, consectetur adipiscing elit.
- USE PUBLIC TRANSPORT**: Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed neque elit, consectetur adipiscing elit. Sed neque elit, consectetur adipiscing elit.

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# Content Marketing | Getting Started

## Get Informed

Dozens of great content marketing resources available to help you and your team learn best practices and new concepts at any level.

## Create a Budget

Content marketing shouldn't consume your entire budget. Allocate an amount that works for your business and increase it each year.

## Set Goals

Be intentional. Every piece of content should have a goal: Awareness, lead generation, web traffic, engagement, etc. Then, report, review, refresh.

# Content Marketing | Strategy



## **Keep it Simple**

The recommended reading level for general marketing content is 8th grade. Keeping it simple can allow your content to be shared with a broader audience and increase your reach.



## **Be Consistent**

Once you've established a tone and voice for your brand, maintain it. Deterring from it with every piece of content can confuse your audience and have a negative impact.



## **Get Creative**

Don't be afraid to push the envelope on what's acceptable for your industry. Unique content is more memorable and can help you stand out from your competition. Find ways to incorporate something trending.



# Content Marketing | Implementation

*“Less than 40% of content marketers have a documented content strategy. As a result, only 35% of content marketers can actually demonstrate the ROI of their content marketing efforts.”*

*Source: Convince and Convert*



**Create a content strategy playbook**



**Create and maintain a content calendar**



**Document your reporting process**

# Content Marketing | Promotion Strategy

## Key to Success:

Repurpose your content and take an omni-channel approach for greater visibility

**Display  
Advertising**

**Social  
Advertising**

**Paid Search**

**Influencers**

**Events**

**Email  
Marketing**

**Online  
Forums**

**Trade  
Publications**

**Media Outlets**

**Your  
Employees**

# Content Marketing | Resources

[HubSpot](#)

[Content Marketing Institute](#)

[SEM Rush](#)

[Moz Blog](#)



# Case Study: LinkedIn

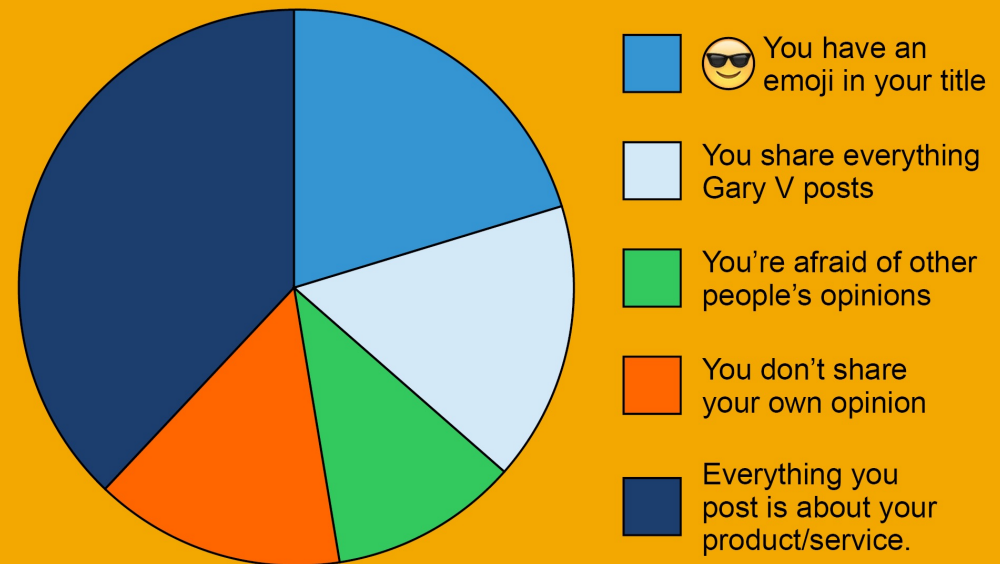
- Omni-Channel Marketing – maintaining the “red thread” through all channels, paying attention to your audience needs and behaviors in each channel
- Content Marketing – consistent messaging throughout both inbound and outbound cements audience perception and reinforces key brand attributes
- How does it all fit together?

# Case Study: LinkedIn

## Some Dos and Don'ts

- **DO** use your profile to show up in search using key words
- **DO** use LinkedIn to connect with colleagues - new & old
- **DO** participate authentically, respectfully and organically
- **DO** write recommendations and endorsements for current or past colleagues to help build both networks
- **DON'T** add your connections to your email list. This is a violation of the Can-Spam Act
- **DON'T** send mass spammy messages that show little effort and violate the “connections before transactions” rule

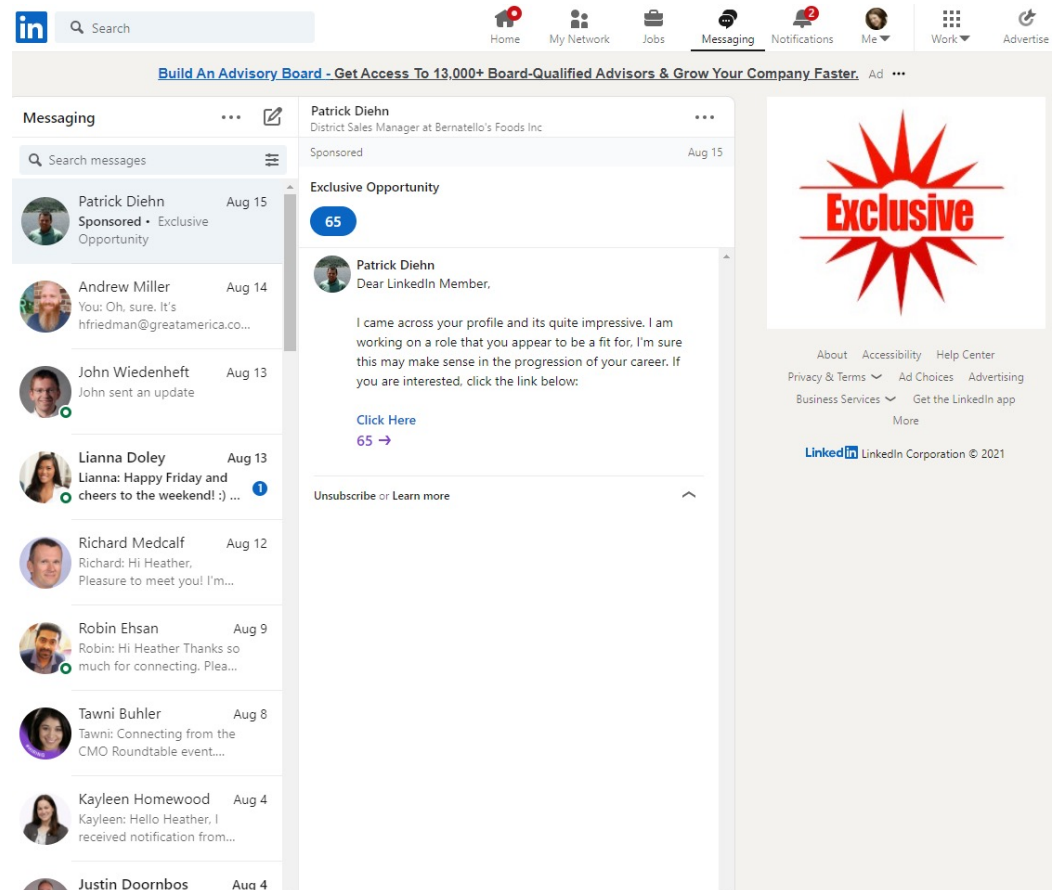
## Why you aren't getting noticed on LinkedIn



# Case Study: LinkedIn

## A Day in the Life

- “Dear LinkedIn Member” = this is a mass email and I didn’t take the time to learn your name
- Great way to find old colleagues who can help with current business issues
- Sharing best practices and article with friends and colleagues
- #4-6 – Do not use the autoresponder to automatically attempt to sell me on your product or service.
- Terrific way to find potential employees – if done in a personal, credible way
- DO NOT send daily emails, videos, LinkedIn messages if we don’t know each other.



# Case Study: LinkedIn

## Mission

Increase booth visits and pre-scheduled appointments at ConExpo Show using LinkedIn

- North America's largest construction trade show.
- March 10 – 13, 2020





# Case Study: LinkedIn

3:49



## ELFA Forecasts Construction to Lead 2020 Equipment Markets

Survey of Equipment Leasing and Finance Assoc. members ranks the expected amount of future financing volume and opportunity

February 4, 2020 | From [Equipment Leasing and Finance Association](#)

### Strategies

- Create outbound messaging in support of the show
- Identify list of vendors, customers, influencers for each sales representative - at the individual, not company, level
- Create content for sales reps to use during the relationship building process

**Equipment**  
TODAY

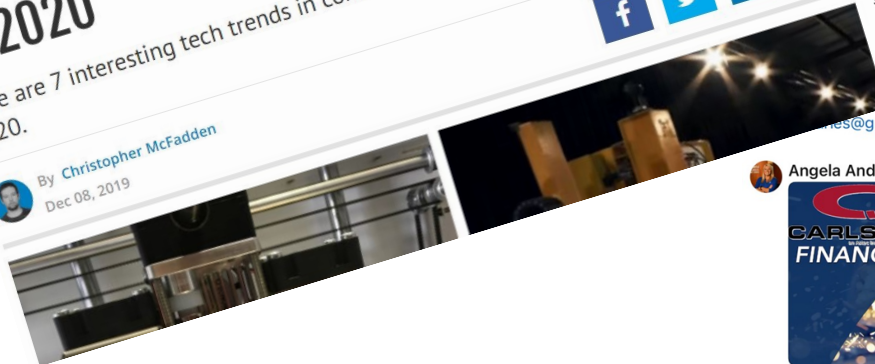
INNOVATION

## 7 Construction Industry Trends to Watch in 2020

Here are 7 interesting tech trends in construction you might want to keep an eye on 2020.



By [Christopher McFadden](#)  
Dec 08, 2019



you are busy during the show and I want to be respectful of your time. If you have availability before or after the show I would love to connect for 10 minutes.

construction division team at America works with manufacturers and dealers like Carlson to provide programs, services and solutions that make it easier for your customers to

share a promotional video together for you! Looking forward to connecting

[angela.andries@greatamerica.com](mailto:angela.andries@greatamerica.com)



Angela Andries · 3:53 pm



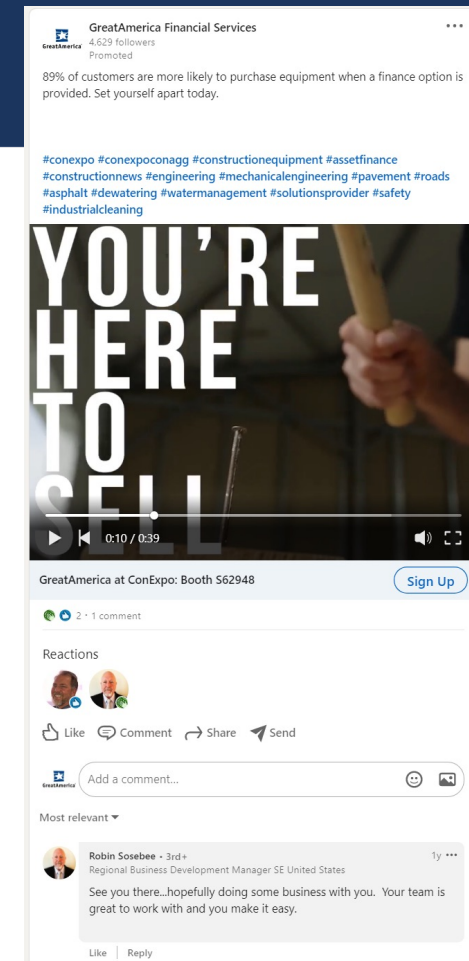
# Case Study: LinkedIn

## Tactics

- Only paid component of this campaign = video meant to autoplay with sound off
- Took Top 50 list from each and winnowed it down based on LinkedIn activity
- Created a guideline for the reps to follow, beefed up bios on their profiles, created personal videos, helped identify where to engage, and provided content for each step of the process.

Targeted ad campaign for upper management to C-Suite of “ideal” construction manufacturers. Successfully reached 1,343 people with 652 views and 5 click-thrus. Of the 652 views, 21 were CEOs, 43 branch/sales managers, 83 President or VP level.

Total spend: \$100







Do you want to learn more about the **ELFA Communications Committee?**

Reach out to Amy Vogt ([avogt@elfaonline.org](mailto:avogt@elfaonline.org)) for more info!

# What's Next?



For previously-recorded web seminars go to:  
[www.elfaonline.org/events/elearning/web-seminars](http://www.elfaonline.org/events/elearning/web-seminars)



Join us on August 25th for:  
**Credit Managers Survey**