



The Financial Services Marketing Handbook: Tactics and Techniques That Produce Results (Bloomberg Financial)

By Evelyn Ehrlich, Duke Fanelli



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The roadmap to success for financial professionals using real-world examples, practical how-to's, and a structured approach to marketing strategy and tactics that covers the basics for beginners and inspires new ideas for marketing pros

The Financial Marketing Services Handbook, Second Edition gives sales and marketing practitioners the practical tools and best practices they need both to improve their job performance and their retail and institutional marketing strategies. *The FSM Handbook* guides marketing and sales professionals working in an industry characterized by cut-throat competition, client mistrust, transformative technologies, and ever-changing regulation, to understand the practical steps they must take to turn these threats into opportunities.

Providing invaluable information on how to target, win, and retain profitable customers, the book presents an overview of the basic marketing functions—segmentation, positioning, brand building, situational analyses, and tactical planning—as they relate specifically to the financial services industry. With up-to-date case studies, showing what has worked and, more tellingly, what hasn't, the book demonstrates how to effectively utilize the marketer's toolbox—from advertising and public relations to social media and mobile marketing.

- Discusses how social media (Twitter, Facebook, blogs, review sites) impact branding and sales
- Packed with new information on landing pages, email success factors, and smartphone apps
- Demonstrates how behavioral economics affect marketing strategy
- Case studies and charts are fully revised and updated

The financial industry is under intense pressure to improve profits, retain high-value clients, and maintain brand equity without straining budgets. The first edition has become an industry-standard reference book and *The Financial Services Marketing Handbook, Second Edition* gives sales and marketing professionals even more of the information they need to stretch value from each marketing dollar.

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Editorial Review

From the Inside Flap

The financial industry is under intense pressure to improve profits, attract and retain high-value clients, and maintain brand equity without straining marketing budgets. The Financial Services Marketing Handbook, Second Edition gives sales and marketing professionals the tools and information they need to get the most value from every dollar.

Financial products are not the same as consumer products and services, and as a result, they need to be marketed differently. This book shows you how, presenting practical how-to steps for maximizing returns on marketing investments using an easy-to-follow, carefully structured approach anyone working in finance can put to good use. Incorporating case studies from industry leaders—including Merrill Lynch, Fidelity, and Bank of America—the book helps you learn from successful (and failed) marketing initiatives.

Highly accessible, this comprehensive volume is organized into two key parts. The first covers the strategic tools of financial marketing, including segmentation, positioning and branding, and creating a market plan. The second section looks at specific financial marketing tactics in depth, including advertising strategies, managing public relations, personal selling, attending trade shows and seminars, as well as sponsorship and event marketing and many others.

The first edition has become an industry standard, and The Financial Services Marketing Handbook, Second Edition includes updated content that addresses all the most important new developments in the field. Featuring coverage of emerging key topics in the industry, including two all-new chapters on social media and interactive marketing, as well as information on the changing face of financial services marketing, how the 2008 financial meltdown impacted the marketing value proposition, advice on defending your brand from online bashers, and more, the book is an essential resource for anyone interested in financial services marketing and sales.

From the Back Cover

praise for the financial services marketing handbook

"Much has changed in financial marketing in the last few years—yet the fundamental principles of success endure. I highly recommend The Financial Services Marketing Handbook, Second Edition. It is both a valuable, comprehensive resource as well as a well-organized road map for financial services marketers to tap as they navigate their brands through the environmental and technological changes that our industry faces today. My advice: read it and keep it."—Bill Wreaks, Chief Executive Officer, The Gramercy Institute; Publishers of The Journal of Financial Advertising & Marketing

"An ambitious, encyclopedic resource for bank marketers . . . [like] a chat with a favorite business professor. This painstakingly detailed analysis reads like a transcription of a meeting with an experienced, down-to-earth marketing consultant . . . Practical checklists to help jumpstart strategies are among the book's most useful features . . . [Those] running community banks may immediately improve their outreach by following even a few of this handbook's tactics."—Matthew de Paula, US Banker (January 2005)

"Well-organized and readable, the Handbook provides a thorough introduction and practical guide to today's

best marketing solutions for the financial industry."—Financial Communications Society
(www.fcsinteractive.com)

About the Author

Evelyn Ehrlich, PhD, is President of EC Communications, a marketing consulting firm that has specialized in financial services since 1982. Her clients have included AXA Advisors, BNY Mellon, JPMorgan Chase, Merrill Lynch, and other leading financial institutions. Ehrlich currently teaches financial services marketing at New York University and has previously taught at Baruch College and the University of Vermont. She has been a speaker for private companies and trade groups, including the Financial Planning Association, the Financial Communications Forum, the Financial Services Marketing Conference, and others.

Louis "Duke" Fanelli has more than thirty years of experience in marketing and financial services. He is currently Senior Vice President, Marketing and Communication for the ANA (Association of National Advertisers), the leading association for client-side marketers. Prior to joining ANA, he served as CMO for Edelman Financial Services, Fairfax, Virginia, a leading independent advisory firm. Earlier, he was a VP of Marketing for AXA Equitable Life Insurance Co., New York. Prior to joining AXA, he spent nearly fifteen years in various communication, marketing, and business leadership positions at Chase. He began his career as a journalist.

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