

1. MARKETING-RETAIL AND BUSINESS PRODUCT/SERVICES

Include	<ul style="list-style-type: none"> • Retail services per household and business services per business client • Services with a balance, i.e. savings, checking, auto loan, mortgage, HELOC, credit card, unsecured lines of credit, investment • Products without balances, i.e. debit card, estatements, direct deposit, online/bill pay, person-to-person, identity security
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Answer: _____
Format: 0.00

2. MARKETING AND CORPORATE COMMUNICATIONS FTE

Include	<ul style="list-style-type: none"> • Copy and graphic content generation • Drafting executive communications • Public relations (crisis and in-house, time spend managing outsourced vendors)
Exclude	<ul style="list-style-type: none"> • Specialized cash management officers (See 'Cash Mgmt Sales' [09]) • Managers of indirect auto relationships (See 'Indirect Sales' [05]) • Business development calling officers, typically in the branch (See 'Branch Other/ Business Development' [01])

Answer: _____
Format: 0.00

3. ONLINE / DIGITAL MARKETING COSTS - TOTAL

Include	<ul style="list-style-type: none"> • Total online marketing costs including online, mobile, social media, email/eStatement, and search engine optimization (SEO)
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Answer: _____
Format: \$0

4. DIRECT MAIL, PRINT, OFFLINE MARKETING COSTS - TOTAL

Include	<ul style="list-style-type: none"> • Print, direct mail, TV/Radio, Outdoor/Billboard, Agency Creative and Placement Fees • Branch marketing materials, i.e. brochures, flyers, banners, in-branch video merchandising
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Answer: _____
Format: \$0

5. CORPORATE DONATIONS AND SPONSORSHIPS

Answer: _____
Format: \$0

6. REGULATORY & CORPORATE COMMUNICATION COSTS

Include	<ul style="list-style-type: none"> • Direct communications from Marketing required by regulatory mandate • Annual reports / Corporate communications
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Answer: _____
Format: \$0

7. SALES PROMOTION COSTS

Include	<ul style="list-style-type: none"> • Sales Awards, Customer Gifts, and Cash Awards
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Answer: _____
Format: \$0

8. MARKETING - OTHER

Include	<ul style="list-style-type: none"> • E.G. Market research, Marketing Customer Information File (MCIF), Lists and all other
Exclude	<ul style="list-style-type: none"> • Salaries and benefits

Answer: _____
Format: \$0

9. PERCENTAGE (%) OF MARKETING COSTS BY THE FOLLOWING MARKETING OBJECTIVES

Instructions	<ul style="list-style-type: none"> • If you don't have a break-out of marketing costs by these categories, please make a best estimate • The sum should equal 100.
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	% Marketing Cost by Objectives
Customer Acquisition	
Retention	
Cross Sales	
Branding	

10. WHICH APPROACH DOES YOUR INSTITUTION USE FOR CUSTOMER SERVICE RATINGS?

Instructions	<ul style="list-style-type: none"> • Please check your primary form of rating customer satisfaction
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- Do Not Track
- Net Promoter Score (e.g. SATMetrix, Loyalty)
- Likelihood to Recommend (e.g. CFI/ACSI, Raddon)
- Other (In-house approach, other 3rd party)