

1. MARKETING-RETAIL AND BUSINESS PRODUCT/SERVICES

Include

- 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, statements, direct deposit, online/bill pay, person-to-person, identity security

Answer: _____

Format: 0.00

2. ONLINE / DIGITAL MARKETING COSTS - TOTAL

Include

- Total online marketing costs including online, mobile, social media, email/eStatement, and search engine optimization (SEO)

Answer: _____

Format: \$0

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

Include

- Print, direct mail, TV/Radio, Outdoor/Billboard, Agency Creative and Placement Fees
- Branch marketing materials, i.e. brochures, flyers, banners, in-branch video merchandising

Answer: _____

Format: \$0

4. CORPORATE DONATIONS AND SPONSORSHIPS

Answer: _____

Format: \$0

5. REGULATORY & CORPORATE COMMUNICATION COSTS

Include

- Direct communications from Marketing required by regulatory mandate
- Annual reports / Corporate communications

Answer: _____

Format: \$0

6. SALES PROMOTION COSTS

Include

- Sales Awards, Customer Gifts, and Cash Awards

Answer: _____

Format: \$0

7. 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

8. 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.
---------------------	--

	% Marketing Cost by Objectives
Customer Acquisition	
Retention	
Cross Sales	
Branding	

9. 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
---------------------	--

- ☐ 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)

10. MARKETING AND CORPORATE COMMUNICATIONS FTE

Include	<ul style="list-style-type: none">• Management of marketing function• Digital marketing including Search Engine Optimization (SEO), website content, social media• Marketing campaigns, research, Marketing Customer Information File (MCIF) management & lists• Copy and graphic content generation• Drafting executive communications• Public relations
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 (See 'Branch Other/ Business Development' [01])

Answer: _____
Format: 0.00