



How to Speak C-Suite When It Comes to Data

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Lost in Translation



83% of CEOs globally see marketing as owning the **growth area.**

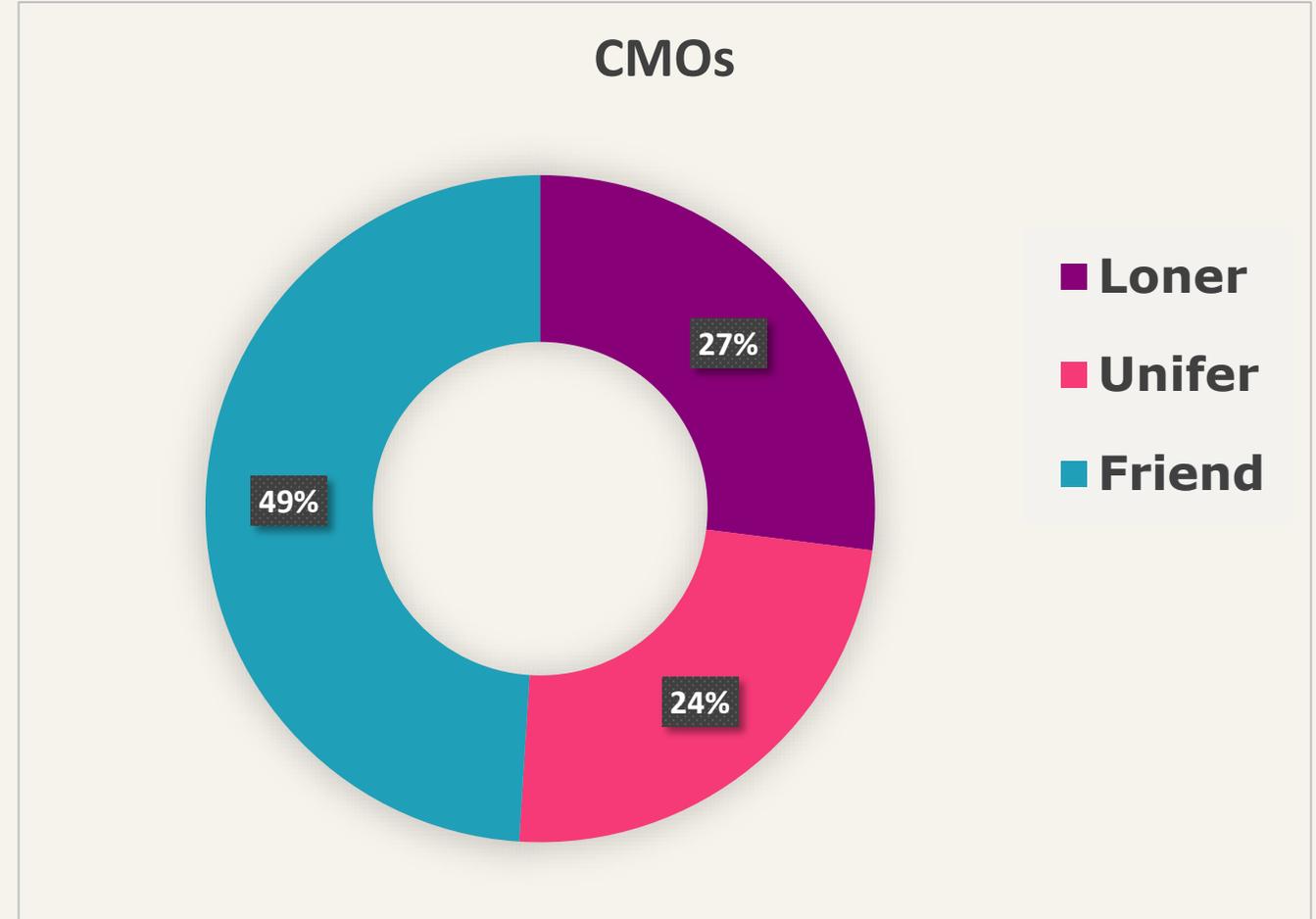
23% don't feel their marketing organization is delivering on the **growth agenda**

Source: : McKinsey & Company, 2019 CEO Study



CMO Archetypes

- **Unifer** – Strong partnership with C-Suite to drive growth
- **Loner** – Limited relationship with C-Suite focused primarily on marketing communications
- **Friend** – Good relationship with 1-2 of C-Suite, especially CEO, with limited responsibility for growth and experience.



Source: : McKinsey & Company, 2019 CEO Study



CMO Archetypes - **Loners**

- Don't have the full support of, or deep relationships with, their C-suite peers.
- Focus on near-term activities like ad campaigns and social media
- Seen by CEOs as executors of brand stewardship, advertising, and PR, not as equal partners
- More likely to implement strategy than develop it
- Often report that their CEO doesn't understand or trust marketing



CMO Archetypes - Friends

- Have one or two allies in the C-suite, often the CEO
- Responsible for top-line growth through marketing
- Don't have broad P&L responsibility or even much influence across the entirety of CX
- Not as adept at speaking the language of the C-suite
- CTOs tend to see them as “customers” of technology rather than partners

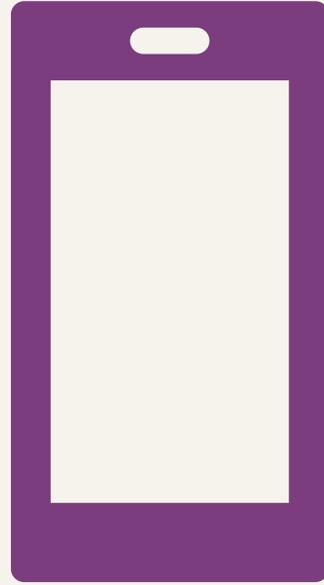


CMO Archetypes - Unifers

- Masters at fostering cross-functional collaboration
- Ensure marketing has a clearly defined role in the eyes of C-suite peers
- Adopt the language & mindset of other C-Suite exec
- Articulate how marketing can help meet the C-Suite needs
- Establish mutual accountability & shared vision



Cue The Audience



Pollev.com/KlariVis



What type of Marketer are you?



How to become a **Unifer**

- Become a **BANKER**
- Have or work for a **SEAT AT THE TABLE**
- Take the C-Suite to lunch – **REGULARLY**
- **Ask questions** – then ask more.
- Become a **DATA STORYTELLER**



What is Data Storytelling?

The practice of building a narrative around a set of data and its accompanying visualizations to help convey the meaning of that data in a powerful and compelling fashion.



The Brain and Storytelling

NEURAL COUPLING

When the brain is exposed to a story, parts of it light up and begins to process it to relate to their own ideas and experiences.

MIRRORING

Both the speaker or storyteller and their listeners experience similar brain activity.

DOPAMINE

Dopamine - a chemical messenger is released by the brain into the system when an emotionally-charged event is experienced. This results in easier and more accurate recall.

CORTEX ACTIVITY

At the onset of processing facts, both the Broca's and Wernicke's areas are activated. The more engaging the story, more areas like the motor, sensory and frontal cortices are additionally stimulated.

Source: Onespot



**Data doesn't change behavior,
emotions do.**

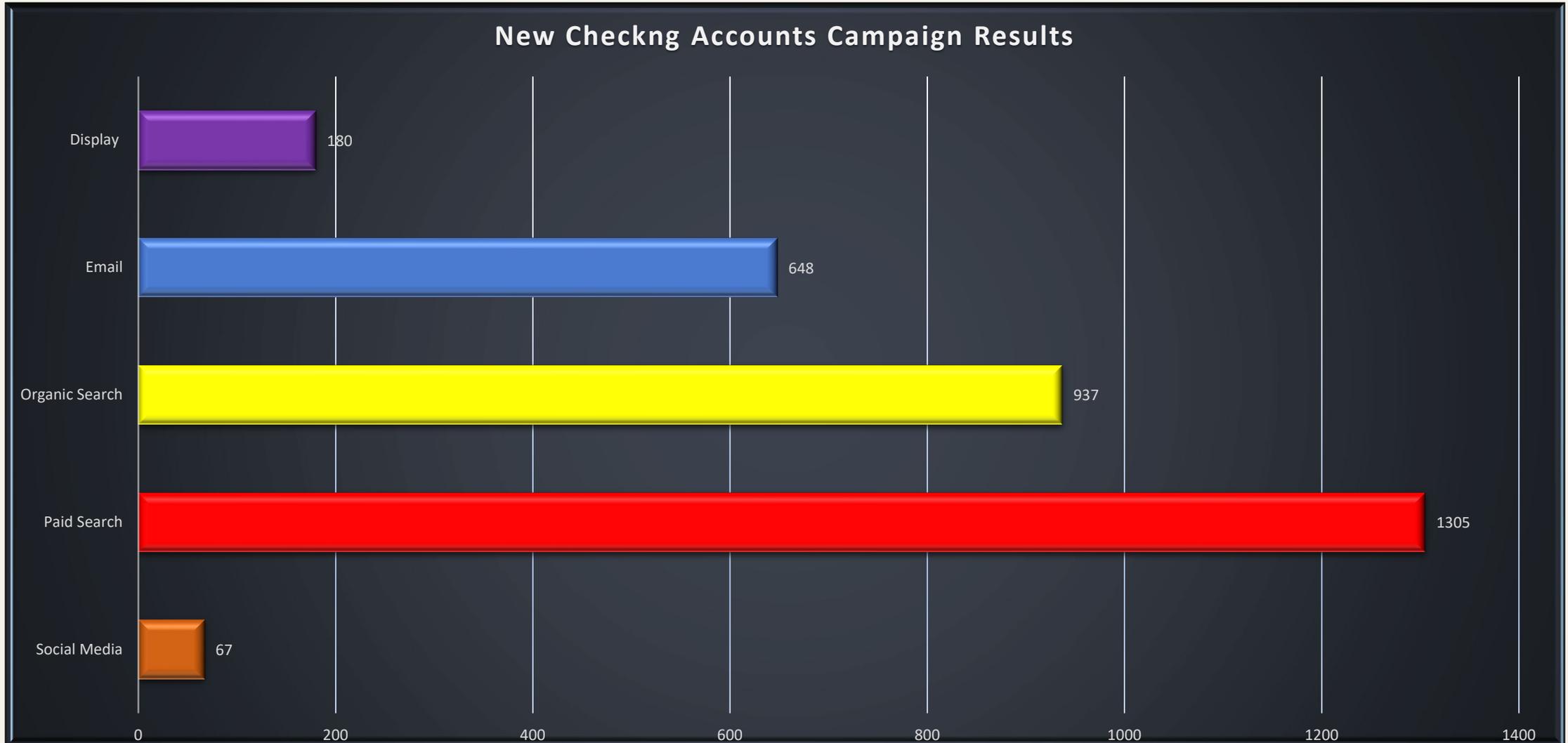
EXAMPLE 1: New Checking Account Campaign

Component #1 - Data

Medium	New Checking Accounts
Social Media	67
Display	180
Email	648
Organic Search	937
Paid Search	1305

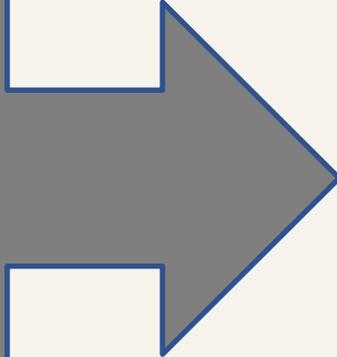


What is the focus?

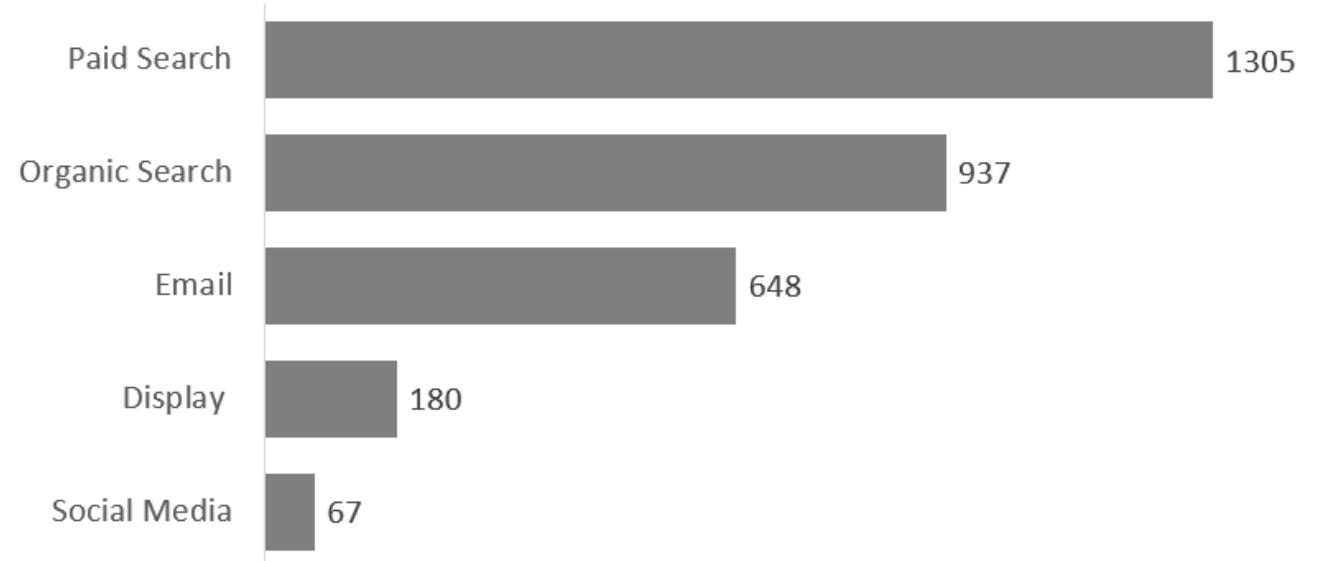


Component #2 – Compelling Visuals

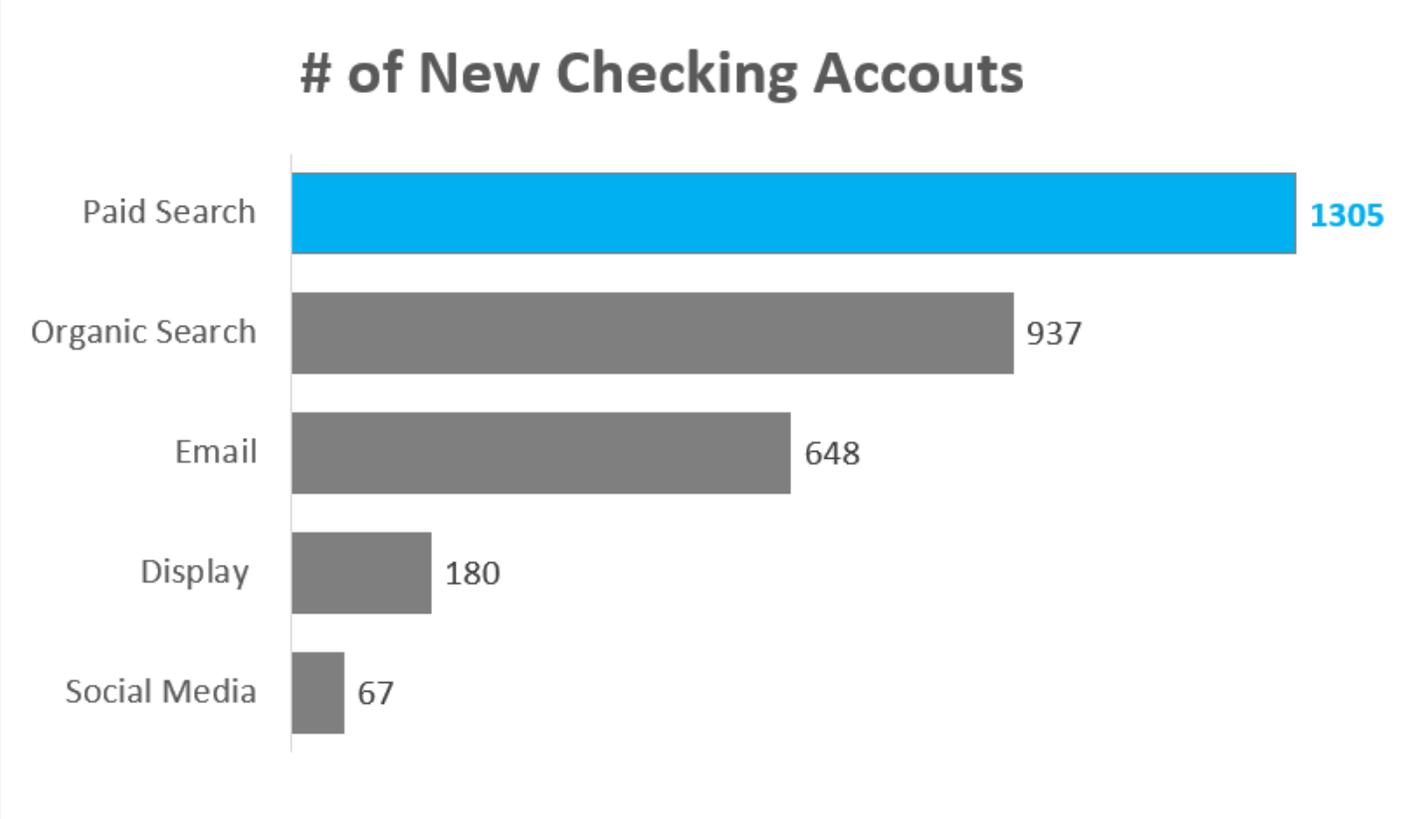
- ✓ Eliminate 3-D
- ✓ Remove background
- ✓ Border, gridlines, axes
- ✓ Refine font choice / size
- ✓ Direct data labeling
- ✓ Intentional coloring



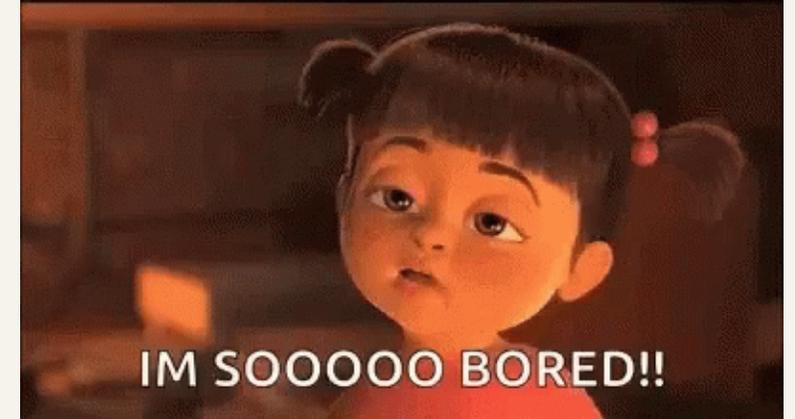
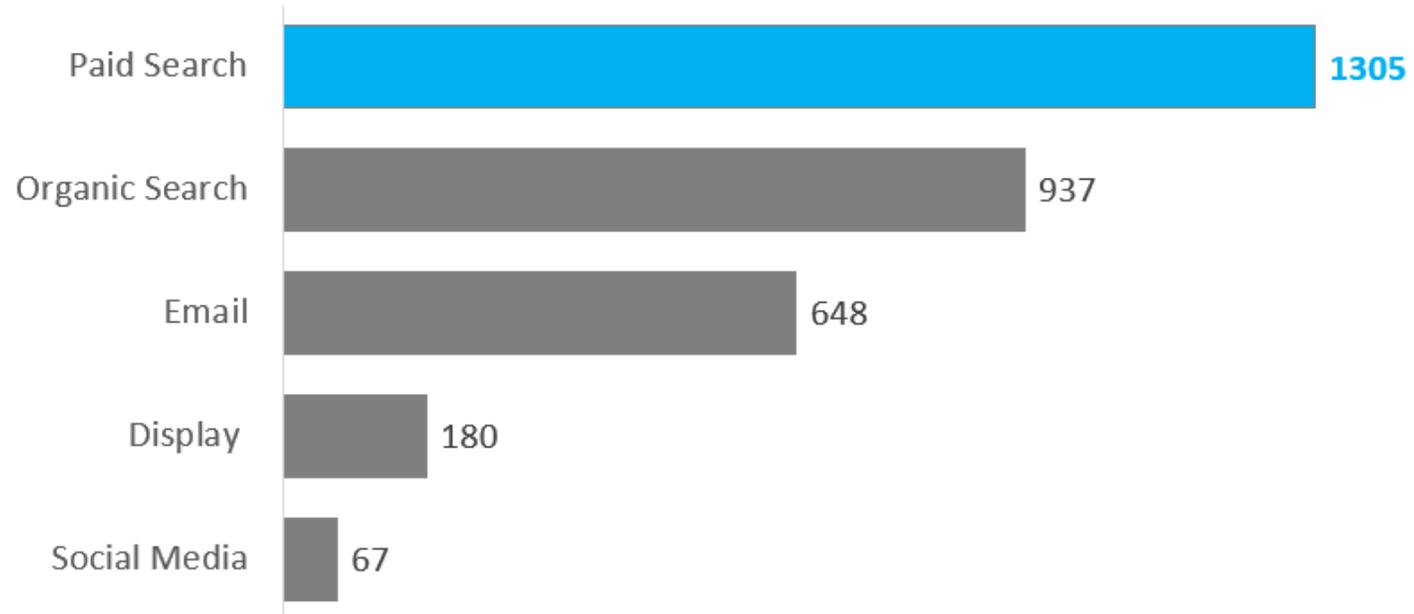
of New Checking Accouts



Emphasize Your **STORY**



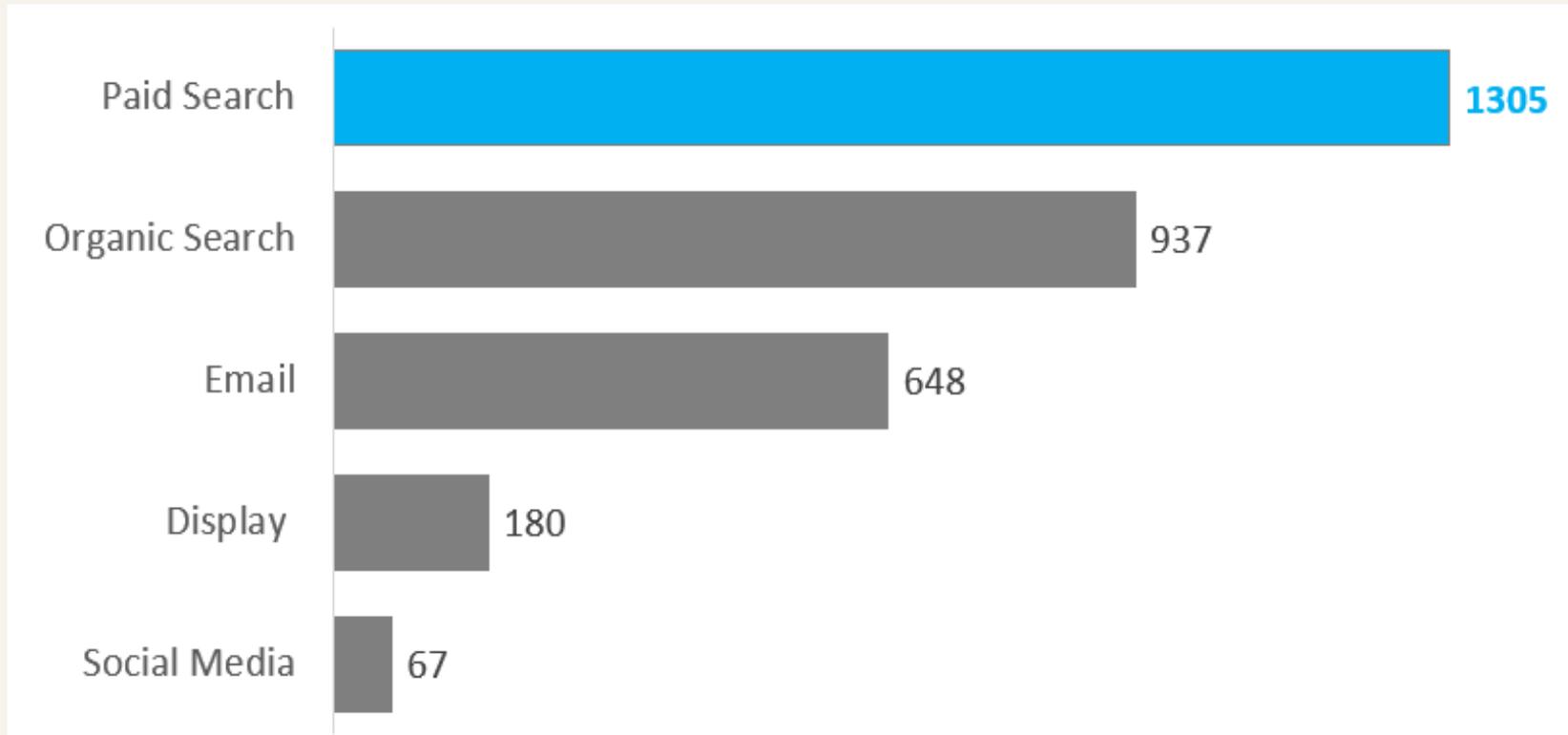
of New Checking Accounts By Channel...Zzzzz



Paid Search generates the highest volume of New Checking Accounts (42%)

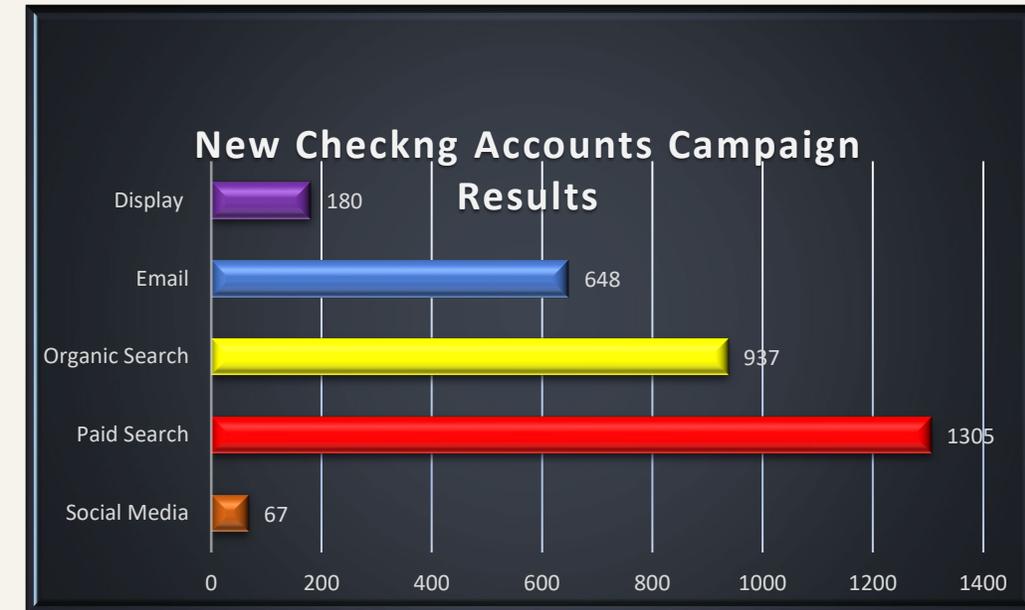
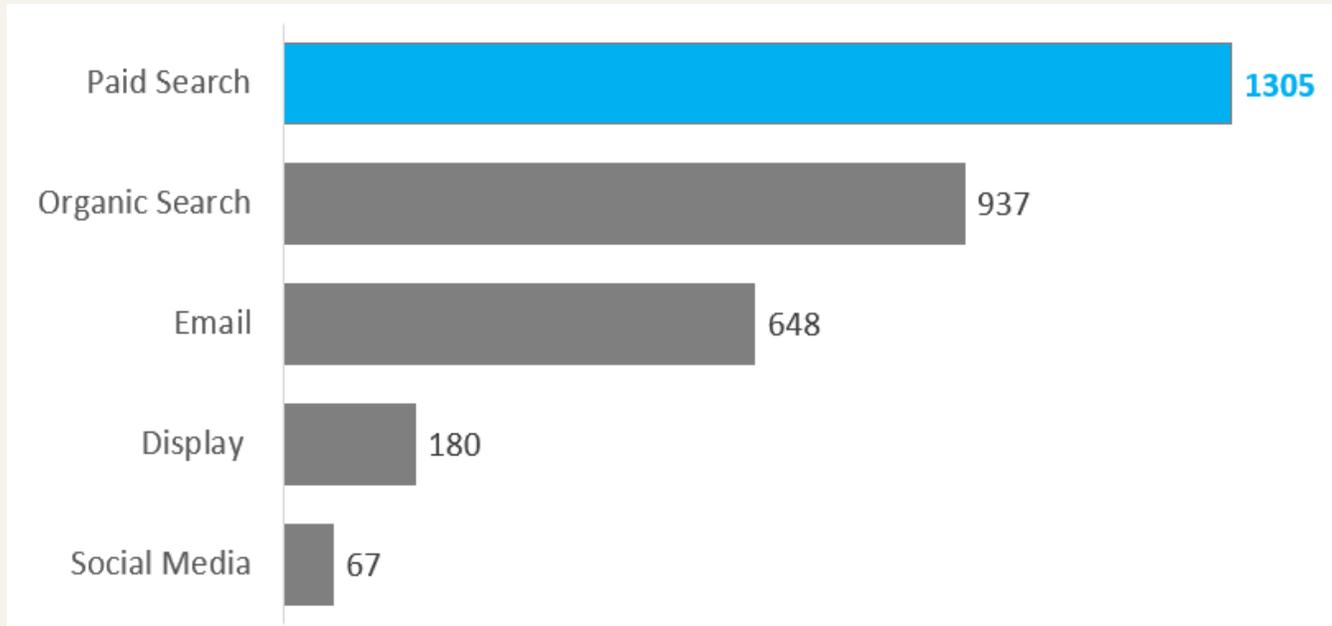
Campaign Channel # of New Accounts

McKinsey Title



Paid Search generates the highest volume of New Checking Accounts (42%)

Campaign Channel # of New Accounts



EXAMPLE 2: Loan Cross Sell Opportunities

Component #3 – The Narrative



Meet Maria

How do you calculate the value of relationships?



By being invested in **you**—
not just your business.

By reaching out to you,
not waiting for your call.

By anticipating your needs,
and offering our expertise.

And by having your back
in good times and bad.

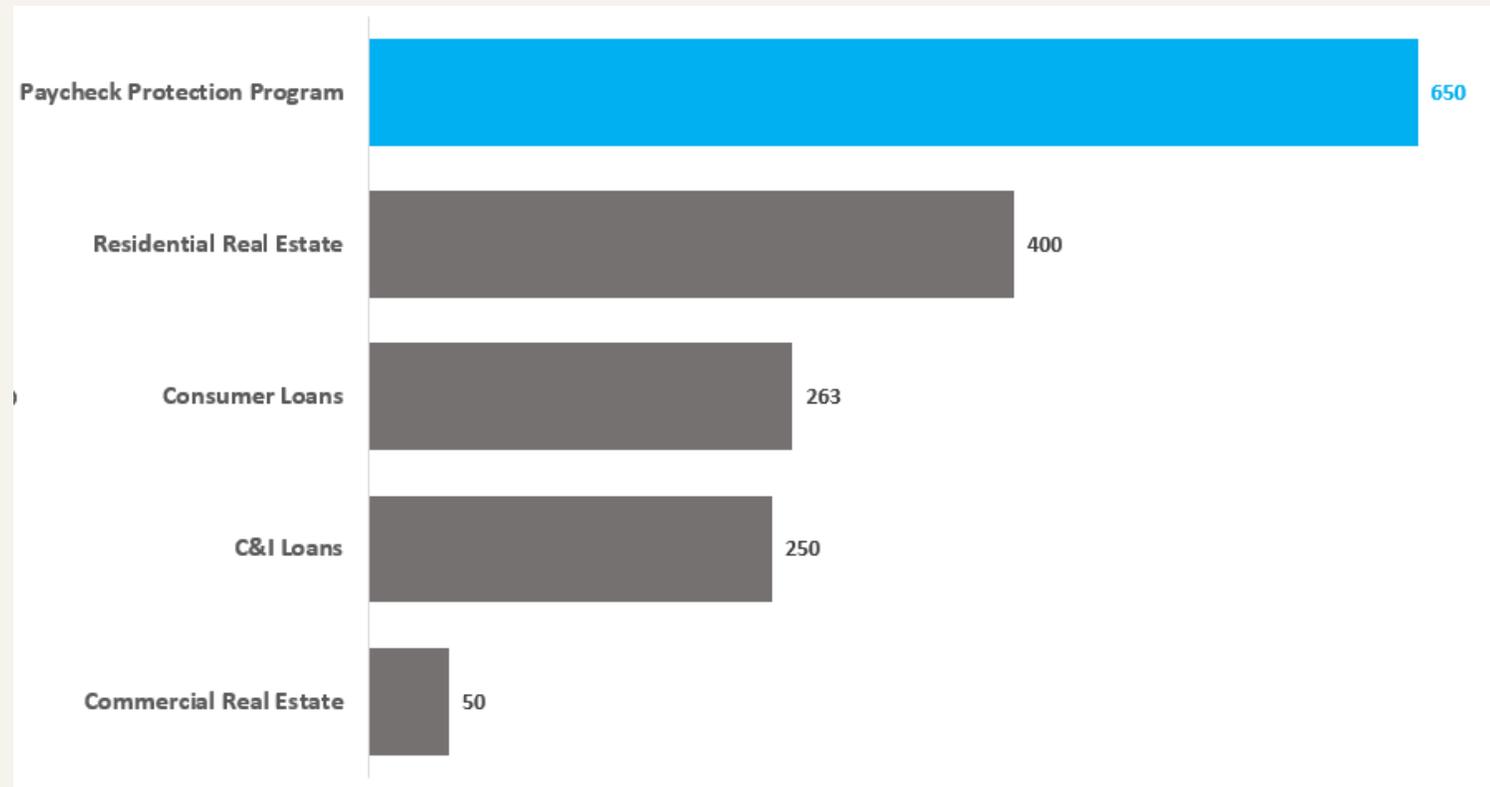
 **HOWARD BANK**
We care about here.
HowardBank.com | 410-750-0020

*THIS LINE IS AN ACTUAL HOWARD BANK CALL CENTER OPERATOR. NOT AN ACTOR.



Component #3 – The Narrative

PPP Loans offer greatest opportunity for cross sell
Single Product Loan Customers

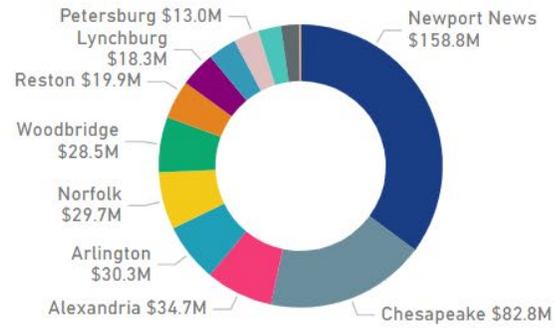


We drink our own Kool-Aid

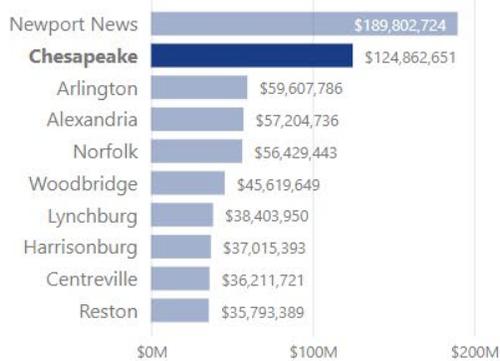
← **Top 25 Depositors**
11/14/2022

Market	Officer
Branch	Type

Portfolio Composition of Top 25 Accounts by Branch



Top 25 Accounts by Branch



Top 25 Depositor Accounts

Current Period	Prior Period	Difference
\$124,862,651 46.7%	\$122,411,597 45.8%	\$2,451,054 0.9%
11/14/2022	10/31/2022	TopN

To See a Larger List. Make a TopN Selection

Customer Name	Current Balance	Prior Period Balance	Difference	% Difference
Hannah Kerluke Sr.	\$26,848,908	\$24,712,647	\$2,136,261	7.96%
Aurelie Hyatt	\$20,028,055	\$20,037,405	(\$9,350)	-0.05%
Haylie Klocko	\$7,997,942	\$7,964,476	\$33,467	0.42%
Craig Shields	\$7,748,126	\$5,792,726	\$1,955,400	25.24%
Kirstin Gerhold	\$7,663,201	\$8,016,816	(\$353,615)	-4.61%
Dr. Leonora Littel	\$6,550,103	\$6,737,008	(\$186,905)	-2.85%
Merl Schaefer	\$6,369,684	\$7,673,160	(\$1,303,476)	-20.46%
Owen Purdy	\$6,345,371	\$6,062,316	\$283,055	4.46%
Kaia Larkin	\$4,884,793	\$4,884,793	\$0	0.00%
Mohammed Simonis	\$3,745,677	\$4,605,577	(\$859,900)	-22.96%
Barton Abshire	\$3,445,531	\$2,789,285	\$656,246	19.05%
Phoebe Kutch	\$3,179,369	\$3,154,016	\$25,353	0.80%
Anya Turcotte	\$3,115,978	\$3,115,978	\$0	0.00%
Elaina Hansen	\$3,105,983	\$3,105,983	\$0	0.00%
Montana Klocko	\$2,019,466	\$2,016,246	\$3,220	0.16%
Cecelia Yundt	\$1,634,167	\$1,633,068	\$1,100	0.07%
Gage Gerhold	\$1,625,443	\$1,625,377	\$66	0.00%
Porter Schuster	\$1,500,288	\$1,532,256	(\$31,968)	-2.13%
Miss Abbie Hegmann	\$1,486,783	\$1,486,851	(\$68)	-0.00%
Guido Fritsch	\$1,412,406	\$1,330,047	\$82,359	5.83%
Ansley Schuster	\$1,407,301	\$1,319,450	\$87,851	6.24%
Leanne Stiedemann Jr.	\$1,381,223	\$1,381,223	\$0	0.00%
Macie Bailey	\$1,366,853	\$1,366,853	\$0	0.00%

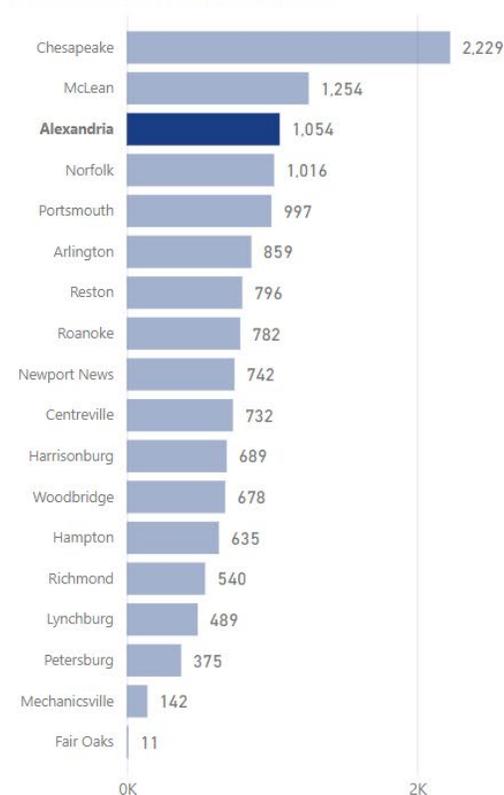


We drink our own Kool-Aid

Single Account Customers: Deposits 11/14/2022

Market	Officer
Branch	Type

Single Deposit Accounts by Branch



Selections
 Product
 Days Open
 Branch
 Officer

Date Opened	Account Number	Customer Name	Type	Balance	Rate	Cel
11/14/2022	999085340	Mathew Vandervort	Interest Checking	\$1,012	0.00%	
11/12/2022	999063459	Issac Eichmann	Savings	\$2,804	0.15%	
11/10/2022	999064989	Jamel Cummings	Savings	\$20	0.03%	555
11/10/2022	999132873	Mckenna Lakin	Noninterest Checking	\$250		
11/9/2022	999191828	Abner Runolfsson	CDs	\$10,000	1.00%	
11/8/2022	999125536	Ella Kilback Jr.	Interest Checking	\$1,250	1.98%	
11/7/2022	999203185	Freddie Blick	Interest Checking	\$5,000	0.01%	
11/2/2022	999068349	Jevon Kirlin	Savings	\$100	0.00%	
10/28/2022	999215376	Ebba DuBuque III	Noninterest Checking	\$42,373		555
10/28/2022	999210244	Kenyon Kiehn	Interest Checking	\$800	1.98%	
10/28/2022	999166978	Miss Kayla Welch	Noninterest Checking	\$453		
10/26/2022	999215115	Kevin Ondricka	Interest Checking	\$0	1.98%	
10/22/2022	999052205	Clyde Hilpert	Interest Checking	\$2,422	1.98%	
10/21/2022	999136629	Cindy Marks	Noninterest Checking	\$539		
10/20/2022	999068137	Laney Padberg	Interest Checking	\$25	0.00%	
10/19/2022	999185085	Anna Mertz	Interest Checking	\$474	1.98%	
10/19/2022	999219512	Greg Treutel	Interest Checking	\$77,065	0.01%	
10/18/2022	999071897	Adelle Friesen	Interest Checking	\$100	1.98%	
10/14/2022	999098481	Gerry D'Amore	Savings	\$1,430	0.10%	
10/13/2022	999172056	Augustus Mitchell Jr.	Interest Checking	\$1,234	1.98%	
10/8/2022	999088226	Dr. Camila Daugherty	Noninterest Checking	(\$42)		
10/5/2022	999029421	Minerva Bradtke	Noninterest Checking	\$1,006		
Balance				\$17,255,280		



Takeaways

- Become a Unifier Marketer
- Simple, direct and intentional visuals are your friend
- Leverage your **SUPERPOWER** as a marketer and tell the story behind the data

