

Table of Contents

INTRODUCTION	3
SETTING MARKETING OBJECTIVES	4
Chart 1: Objectives for Basic Checking	4
Chart 2: Objectives for Hispanic Customers	5
Chart 3: Objectives for Financial Seminars.	5
SEGMENTING YOUR MARKETS	6
Case Study A: Targeting the Spanish-Speaking Market Segment.	7
Case Study B: An Example of Lifestyle Segmentation	8
Case Study C: Finding New-Car Buyers Before They Buy	9
Segmentation of Commercial Markets.	9
Case Study D: Marketing the Familiar	10
How to Segment	10
Case Study E: Does Wealth Equal Profitability?.	12
ANALYZING YOUR ENVIRONMENT AND YOUR COMPETITORS	12
Chart 4: Sample Competitive Assessment.	13
Case Study F: Planning for Growth—Competitive Analysis.	14
TAKING BUDGET INTO CONSIDERATION	14
Chart 5: 2004 Marketing Spending as Percent of Revenue (Banks)	15
Chart 6: 2004 Marketing Spending as Percent of Revenue (Thrifts)	15
CHOOSING TACTICS	16
Chart 7: Commonly Used Community Bank Marketing Tactics.	16
PRIORITIZING TACTICS	17
Case Study G: Planning for Growth—Choosing Tactics	18
GETTING THE PLAN OFF THE GROUND	19
Scheduling	19
Chart 8: Sample Promotional Schedule	20
Tracking.	20
Not Just a Plan.	21
Top 10 Marketing Mistakes.	22
APPENDIX A: STRATEGIC MARKETING PLAN CHECKLIST	24, CD-ROM
APPENDIX B: SAMPLE MARKETING PLAN: ACB COMMUNITY BANK	25, CD-ROM
APPENDIX C: BANK MARKETING BUDGET FORM	29, CD-ROM
APPENDIX D: SAMPLE MARKETING PLAN FORM	CD-ROM
<i>Do-It-Yourself</i> FORMS ON CD-ROM	BACK COVER