

Domain 1: Data, Research and Measurement | 20%

Task 1: Make strategic, data-driven marketing decisions.

Knowledge of:

- a. Surveys (e.g., customer, rate)
- b. Focus groups
- c. Competitive/market analysis (SWOT)
- d. Brand awareness study
- e. Deposit share FDIC
- f. Share of voice
- g. Mystery shops

Task 2: Research client profiles to identify needs.

Knowledge of:

- a. CRM/MCIF
- b. Data warehouse
- c. Product adoption/Cross-sell next best product
- d. Client experience/Journey mapping
- e. Data points (e.g., segmentation, attrition rate, psychographics, demographics)

Task 3: Procure data from primary and secondary sources to assess competitive environment.

Knowledge of:

- a. Share of market: FDIC summary of deposits
- b. Share of voice: weight and frequency in advertising against competition
- c. Rate survey
- d. Mystery shops

Task 4: Apply return-on-investment (ROI) methodologies to measure product sales outcomes.

Knowledge of:

- a. ROI
- b. Sales tracking
- c. Expense tracking (e.g., advertising, direct mail)

Ability to:

- d. Calculate product lift, income vs. cost
- e. Calculate ROI

Task 5: Establish digital metrics to determine the results of marketing initiatives.

Knowledge of:

- a. KPIs
- b. Conversions/Leads
- c. SEO/listings management/SEM in place to support website
- d. Access to reporting and interpretation (e.g., Google analytics)

Ability to:

- e. Interpret metrics (e.g., impressions, CTR, CTW, CPC)
- f. Communicate meaning/value to management

Task 6: Collaborate with various business lines to measure and increase sales.

Knowledge of:

- a. CRM
- b. Data warehouse
- c. Marketing automation

Ability to:

- d. Define goals and build operating plan

Task 7: Leverage data to support marketing recommendations made to executive management.

Knowledge of:

- a. Loan-to-deposit ratio, rate setting, asset/liability management (ALCO)
- b. Competitive analysis (e.g., Uniform Bank Performance Report, FDIC summary of deposits, interest rate)
- c. New product/services adoption via MCIF/core data
- d. Technological advances

Task 8: Define marketing parameters and ways to calculate ROI for events.

Knowledge of:

- a. Budget
- b. Bank's strategy for charitable giving
- c. Client base or target market
- d. Community support to foster good will
- e. CRA

Ability to:

- f. Plan
- g. Find added value, negotiate for brand exposure

Task 9: Define the client journey and identify communication preferences.

Knowledge of:

- a. MCIF/CRM: knowing your client
- b. Segmentation (e.g., behavioral, contextual, generational)
- c. Communication channels

Ability to:

- d. Define personas

Task 10: Track progress and efficacy of marketing campaigns.

Knowledge of:

- a. FI Core/MCIF
- b. Sales goals and reporting
- c. Budget tracking
- d. ROI
- e. Marketing data resources

Domain 2: Strategy | 21%

Task 1: Create segmentation strategies to target messaging.

Knowledge of:

- a. MCIF
- b. Segmentation (e.g., households, demographics)
- c. Geotargeting

Ability to:

- d. Identify life stages and connect with relevant products and services

Task 2: Align marketing resources with strategic organizational goals.

Knowledge of:

- a. Supporting lines of business and their goals
- b. Strategic plan
- c. Collaboration strategies
- d. Current market conditions

Ability to:

- e. Collaborate with various business lines

Task 3: Translate the strategic organizational goals into actionable marketing tactics.

Knowledge of:

- a. Strategic plan
- b. Current market conditions
- c. Marketing strategy/dashboard
- d. Applicable resources/vendors

Ability to:

- e. Write marketing plans

Task 4: Create an annual marketing plan.

Knowledge of:

- a. Budgeting
- b. Strategic plan
- c. Competition
- d. Structure of a marketing plan (e.g., SWOT analysis)

Ability to:

- e. Write/revise marketing plans

Task 5: Budget marketing resources to support the marketing plan.

Knowledge of:

- a. Budgeting
- b. Strategic plan
- c. Due diligence process to vet vendors
- d. Applicable resources (e.g., staff, technology)

Task 6: Synthesize industry trends to develop marketing tactics.

Knowledge of:

- a. Competition
- b. Industry trends
- c. Relevant/objective sources
- d. Bias (e.g., media, research, personal)

Ability to:

- e. Critically examine sources

Domain 3: Revenue Generation | 20%

Task 1: Create and measure shareholder value.

Knowledge of:

- a. Return on equity
- b. Return on assets
- c. Efficiency ratios
- d. ROI
- e. Share of market/voice
- f. Statements of condition
- g. Income statement
- h. Balance sheet

Task 2: Quantify and communicate financial outcomes of initiatives to leadership.

Knowledge of:

- a. Key metrics and how they are measured

Ability to:

- b. Create executive summaries
- c. Compile and report key metrics

Task 3: Develop campaigns to meet sales goals.

Knowledge of:

- a. Marketing budget
- b. Strategic goals for departments/business lines
- c. Regulatory limitations

Ability to:

- d. Identify target audience
- e. Identify most/least relevant channels

Task 4: Recognize current market conditions and competition to price deposits.

Knowledge of:

- a. Loan-to-deposit ratio
- b. Current rates
- c. Asset/liability management (ALCO)

Ability to:

- d. Interpret relevant internal and external reports (e.g., rate report, housing report)
- e. Track market trends

Domain 4: Communication and Brand | 25%

Task 1. Build an effective internal communication plan.

Knowledge of:

- a. Verbal and written means
- b. Systems and communications tools
- c. Feedback evaluation and response methodologies (e.g., surveys)
- d. Points of contact
- e. Organizational chart

Task 2. Develop an external communication plan.

Knowledge of:

- a. Various communication channels
- b. Public relations (e.g., news releases, media training, digital)
- c. Advertising
- d. Relevant educational content
- e. Strategic organizational goals

Task 3. Create strategy to build the brand.

Knowledge of:

- a. Brand guidelines
- b. Brand promise
- c. Core values
- d. Organization-wide engagement
- e. Measurement of brand equity (e.g., market studies, internal/cultural studies, integration into performance evaluations)
- f. Consistent messaging and brand voice

Task 4. Create appropriate content to engage audiences.

Knowledge of:

- a. Goals and tactics
- b. Segmentation strategies
- c. Education and fraud prevention
- d. Business lines/Product lines
- e. Channels (e.g., digital, traditional, media, in-person)
- f. Types of content (third-party, original)
- g. Legal and compliance considerations
- h. Diversity and inclusion

Task 5. Construct a crisis communication plan.

Knowledge of:

- a. Business continuity plan (e.g., crisis team, incident response plan, prepared statements, internal communication plan)
- b. Predetermined public relations firm options
- c. Media training
- d. Authorized and appointed spokespersons
- e. Role of senior leadership, regulators, and law enforcement

Domain 5: Risk Management | 14 %

Task 1. Establish a complaint management process.

Knowledge of:

- a. Policy (e.g., incident response, assessment, reporting, internal communication, resolution)
- b. Customer communication
- c. Feedback

Task 2. Ensure compliance with the Community Reinvestment Act (CRA).

Knowledge of:

- a. CRA officer
- b. CRA context plan
- c. Corporate charitable giving and sponsorships
- d. Educational programming
- e. Community development
- f. Volunteerism
- g. Fair lending
- h. Public file

Task 3. Collaborate to ensure ADA compliance.

Knowledge of:

- a. Regulations
- b. Physical buildings
- c. ATMs
- d. Third-party vendors
- e. Website accommodations (e.g., audio, video)

Task 4. Manage vendor risk.

Knowledge of:

- a. RFP process
- b. Contract review
- c. Due diligence
- d. Legal review process

Task 5. Develop and disseminate accurate information.

Knowledge of:

- a. Business lines
- b. Fair lending
- c. Unfair, deceptive, or abusive acts or practices (UDAAP)
- d. Consumer compliance regulations
- e. FINRA
- f. FTC
- g. Investor relations
- h. Brand voice

Ability to:

- i. Create clear and concise communications

Task 6. Monitor advertising content for accuracy and consistency.

Knowledge of:

- a. Business lines
- b. Project management (e.g., goals, project description, team members, recordkeeping/archives, approvals)
- c. Compliance

Task 7. Control exposure to risk by complying with regulations.

Knowledge of:

- a. Business lines
- b. Fair lending
- c. Unfair, deceptive, or abusive acts or practices (UDAAP)
- d. Consumer compliance regulations
- e. FINRA
- f. FTC
- g. Investor relations

Task 8. Ensure compliance with digital advertising guidelines.

Knowledge of:

- a. Segmentation
- b. Geotargeting
- c. Targeting and retargeting
- d. SEO/SEM
- e. Website maintenance/recordkeeping
- f. Consumer compliance regulations
- g. Investor relations