NEEDS TO LEADS OVERVIEW

TARGET Existing Bank customer base | **RESPONSE OBJECTIVE** 10% of reachable customer base | **SALES CYCLE** 1–6 months

PHASE I

Planning

- Identify and engage bank stakeholders
- Determine communication channels
- Creative development
- Establish system for lead follow-up/responder tracking
- Communicate schedule and expectations
- Establish response metrics to measure success of the program

PHASE II

Outreach

- Launch communication tactics
- Seek participation from customer base through multichannel messaging
- Collect and prepare lead data for follow-up

PHASE III

Follow-Up

- Follow-up by Bank to all responders
- Appointment setting
- Leverage sales opportunities created by customer needs

PHASE IV

Analysis

- Conversion analysis: understanding how many responders engaged in a new product or service within six months
- Calculate program ROI

SAMPLE TIMING

Month 1: Input meeting, content discussions, Communications Brief to client

Month 2: Communications Brief approved, creative development, creative to client

Month 3: Creative approved, follow-up schedule/plan in place, launch preparation

Month 4: Program launches and remains live for 1–2 months; follow-up calling begins

Month 5: Response collection and calling continue

Month 6: Program closes, conversion tracking/analysis begins

NEEDS TO LEADS

Mary Bonaccio
Director of Client Services
marybonaccio@needstoleads.com