



<b>DOMAIN 1: DATA, RESEARCH, AND MEASUREMENT (20%)</b>
<b>Task 1: Make strategic, data-driven marketing decisions.</b>
<b>Knowledge of:</b>
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
<b>Task 2: Research client profiles to identify needs.</b>
<b>Knowledge of:</b>
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)
<b>Task 3: Procure data from primary and secondary sources to assess competitive environment.</b>
<b>Knowledge of:</b>
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
<b>Task 4: Apply return-on-investment (ROI) methodologies to measure product sales outcomes.</b>
<b>Knowledge of:</b>
a. ROI
b. Sales tracking
c. Expense tracking (e.g., advertising, direct mail)
<b>Ability to:</b>
d. Calculate product lift, income vs. cost
e. Calculate ROI



<b>Task 5: Establish digital metrics to determine the results of marketing initiatives.</b>
<b>Knowledge of:</b>
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)
<b>Ability to:</b>
e. Interpret metrics (e.g., impressions, CTR, CTW, CPC)
f. Communicate meaning/value to management
<b>Task 6: Collaborate with various business lines to measure and increase sales.</b>
<b>Knowledge of:</b>
a. CRM
b. Data warehouse
c. Marketing automation
<b>Ability to:</b>
d. Define goals and build operating plan
<b>Task 7: Leverage data to support marketing recommendations made to executive management.</b>
<b>Knowledge of:</b>
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
<b>Task 8: Define marketing parameters and ways to calculate ROI for events.</b>
<b>Knowledge of:</b>
a. Budget
b. Bank's strategy for charitable giving
c. Client base or target market
d. Community support to foster good will
e. CRA
<b>Ability to:</b>
f. Plan
g. Find added value, negotiate for brand exposure



<b>Task 9: Define the client journey and identify communication preferences.</b>
<b>Knowledge of:</b>
a. MCIF/CRM: knowing your client
b. Segmentation (e.g., behavioral, contextual, generational)
c. Communication channels
<b>Ability to:</b>
d. Define personas
<b>Task 10: Track progress and efficacy of marketing campaigns.</b>
<b>Knowledge of:</b>
a. FI Core/MCIF
b. Sales goals and reporting
c. Budget tracking
d. ROI
e. Marketing data resources
<b>DOMAIN 2: STRATEGY (21%)</b>
<b>Task 1: Create segmentation strategies to target messaging.</b>
<b>Knowledge of:</b>
a. MCIF
b. Segmentation (e.g., households, demographics)
c. Geotargeting
<b>Ability to:</b>
d. Identify life stages and connect with relevant products and services
<b>Task 2: Align marketing resources with strategic organizational goals.</b>
<b>Knowledge of:</b>
a. Supporting lines of business and their goals
b. Strategic plan
c. Collaboration strategies
d. Current market conditions
<b>Ability to:</b>
e. Collaborate with various business lines



<b>Task 3: Translate the strategic organizational goals into actionable marketing tactics.</b>
<b>Knowledge of:</b>
a. Strategic plan
b. Current market conditions
c. Marketing strategy/dashboard
d. Applicable resources/vendors
<b>Ability to:</b>
e. Write marketing plans
<b>Task 4: Create an annual marketing plan.</b>
<b>Knowledge of:</b>
a. Budgeting
b. Strategic plan
c. Competition
d. Structure of a marketing plan (e.g., SWOT analysis)
<b>Ability to:</b>
e. Write/revise marketing plans
<b>Task 5: Budget marketing resources to support the marketing plan.</b>
<b>Knowledge of:</b>
a. Budgeting
b. Strategic plan
c. Due diligence process to vet vendors
d. Applicable resources (e.g., staff, technology)
<b>Task 6: Synthesize industry trends to develop marketing tactics.</b>
<b>Knowledge of:</b>
a. Competition
b. Industry trends
c. Relevant/objective sources
d. Bias (e.g., media, research, personal)
<b>Ability to:</b>
e. Critically examine sources



DOMAIN 3: REVENUE GENERATION (20%)
<b>Task 1: Create and measure shareholder value.</b>
<b>Knowledge of:</b>
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
<b>Task 2: Quantify and communicate financial outcomes of initiatives to leadership.</b>
<b>Knowledge of:</b>
a. Key metrics and how they are measured
<b>Ability to:</b>
b. Create executive summaries
c. Compile and report key metrics
<b>Task 3: Develop campaigns to meet sales goals.</b>
<b>Knowledge of:</b>
a. Marketing budget
b. Strategic goals for departments/business lines
c. Regulatory limitations
<b>Ability to:</b>
d. Identify target audience
e. Identify most/least relevant channels
<b>Task 4: Recognize current market conditions and competition to price deposits.</b>
<b>Knowledge of:</b>
a. Loan-to-deposit ratio
b. Current rates
c. Asset/liability management (ALCO)
<b>Ability to:</b>
d. Interpret relevant internal and external reports (e.g., rate report, housing report)
e. Track market trends



<b>DOMAIN 4: COMMUNICATION AND BRAND (25%)</b>
<b>Task 1. Build an effective internal communication plan.</b>
<b>Knowledge of:</b>
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
<b>Task 2. Develop an external communication plan.</b>
<b>Knowledge of:</b>
a. Various communication channels
b. Public relations (e.g., news releases, media training, digital)
c. Advertising
d. Relevant educational content
e. Strategic organizational goals
<b>Task 3. Create strategy to build the brand.</b>
<b>Knowledge of:</b>
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
<b>Task 4. Create appropriate content to engage audiences.</b>
<b>Knowledge of:</b>
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



<b>Task 5. Construct a crisis communication plan.</b>
<b>Knowledge of:</b>
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
<b>DOMAIN 5: RISK MANAGEMENT (14%)</b>
<b>Task 1. Establish a complaint management process.</b>
<b>Knowledge of:</b>
a. Policy (e.g., incident response, assessment, reporting, internal communication, resolution)
b. Customer communication
c. Feedback
<b>Task 2. Ensure compliance with the Community Reinvestment Act (CRA).</b>
<b>Knowledge of:</b>
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
<b>Task 3. Collaborate to ensure ADA compliance.</b>
<b>Knowledge of:</b>
a. Regulations
b. Physical buildings
c. ATMs
d. Third-party vendors
e. Website accommodations (e.g., audio, video)
<b>Task 4. Manage vendor risk.</b>
<b>Knowledge of:</b>
a. RFP process
b. Contract review
c. Due diligence



d. Legal review process
<b>Task 5. Develop and disseminate accurate information.</b>
<b>Knowledge of:</b>
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
<b>Ability to:</b>
i. Create clear and concise communications
<b>Task 6. Monitor advertising content for accuracy and consistency.</b>
<b>Knowledge of:</b>
a. Business lines
b. Project management (e.g., goals, project description, team members, recordkeeping/archives, approvals)
c. Compliance
<b>Task 7. Control exposure to risk by complying with regulations.</b>
<b>Knowledge of:</b>
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
<b>Task 8. Ensure compliance with digital advertising guidelines.</b>
<b>Knowledge of:</b>
a. Segmentation
b. Geotargeting
c. Targeting and retargeting
d. SEO/SEM
e. Website maintenance/recordkeeping
f. Consumer compliance regulations
g. Investor relations