

TEAMS, COLLABORATION, & PRESENTING

“Think of your marketing department like your own advertising or creative agency within your credit union.”

- LISTEN TO THE FULL PODCAST EPISODE AT WWW.BRAIDCREATIVE.COM/CREDITUNIONPODCAST

A CHECKLIST: We've included a checklist you can reference for your meetings and presentations so you can be more collaborative with your team!

STEP 1 - YOUR MEETINGS:

- Who should be in the meeting?
 - whether they have something to contribute, collaborate, or learn by being there
- Get it on the calendar
 - weekly huddle-up meetings
 - quarterly & yearly planning meetings
- Print out & pin-up materials to review
- Make it visual - whitepapers & markers
 - Bullet point what people are up to
 - Circle what is gaining energy
 - Draw mindmaps
- Have a beginning, middle, and end
 - Define objectives & clarify vision
 - Brainstorm & process
 - Set clear next steps for each team member
- Gather input from the team
- Celebrate your wins!
 - This could be as simple as sharing your results
 - Highlighting an MVP on your team
 - Or celebrating with a team happy hour!

STEP 2 - YOUR PRESENTATIONS:

- Recap goals & objectives
- Mirror back insights & vision
- Share past creative & results
- Share research and trends
- Show top-line messaging strategy
- Share creative inspiration + moodboard
- List out marketing tactics
- Share final design look & feel for approval

YOUR NEXT CAMPAIGN "DECK"

A visual presentation goes a long way to get everyone inside your team (and outside your team) on the same page with what you have planned and/or already accomplished with your campaign. Imagine a table of contents for your campaign "deck." It's a little more work, but 8-12 slides can be so much more effective in informing and engage your team than a spreadsheet, document, or chain of emails. The slides could be:

1. OVERVIEW OF GOALS	2. OFFER DETAILS & TIMING	3. TARGET AUDIENCE	4. COMPETITIVE REVIEW	5. PAST CAMPAIGN	6. CREATIVE STRATEGY
7. MESSAGING & VOICE	8. INSPIRATION / MOOD BOARD	9. DESIGN, HEADLINE & COPY (A)	10. DESIGN, HEADLINE & COPY (B)	11. OTHER TACTIC EXAMPLES	12. MARKETING STRATEGY & TACTICS