



# **The Financial Services Marketing Handbook: Tactics and Techniques That Produce Results (Bloomberg Financial)**

*Evelyn Ehrlich, Duke Fanelli*

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**The roadmap to success for financial professionals using real-world examples, practical how-to's, and a structured approach to marketing strategy and tactics that covers the basics for beginners and inspires new ideas for marketing pros**

*The Financial Marketing Services Handbook, Second Edition* gives sales and marketing practitioners the practical tools and best practices they need both to improve their job performance and their retail and institutional marketing strategies. *The FSM Handbook* guides marketing and sales professionals working in an industry characterized by cut-throat competition, client mistrust, transformative technologies, and ever-changing regulation, to understand the practical steps they must take to turn these threats into opportunities.

Providing invaluable information on how to target, win, and retain profitable customers, the book presents an overview of the basic marketing functions—segmentation, positioning, brand building, situational analyses, and tactical planning—as they relate specifically to the financial services industry. With up-to-date case studies, showing what has worked and, more tellingly, what hasn't, the book demonstrates how to effectively utilize the marketer's toolbox—from advertising and public relations to social media and mobile marketing.

- Discusses how social media (Twitter, Facebook, blogs, review sites) impact branding and sales
- Packed with new information on landing pages, email success factors, and smartphone apps
- Demonstrates how behavioral economics affect marketing strategy
- Case studies and charts are fully revised and updated

The financial industry is under intense pressure to improve profits, retain high-value clients, and maintain brand equity without straining budgets. The first edition has become an industry-standard reference book and *The Financial Services Marketing Handbook, Second Edition* gives sales and marketing professionals even more of the information they need to stretch value from each marketing dollar.

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