



AI Tools Reshaping Marketing

MBA BEST Conference
March 22, 2024
Eric Cook, MBA



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 @EricCookMBA



- “Recovering banker” of 15 years
- **WSI agency** and digital strategist since 2007
- Conference speaker, educator, avid cyclist, lover of golden retrievers
 - GSB Madison (2003) and faculty at several banking schools around the nation
- Three-time contributor – **Digital Minds**
- Bank mastermind & mentoring community
 - **TheLinkedBanker.com**



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First, Some Puppy Time...



Prompt: A litter of golden retriever puppies playing in the snow. Their heads pop out of the snow, covered in.



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What We'll Cover Today

1. ChatGPT and LLMs
2. Key opportunities for marketers
3. Sample prompting framework
4. Steps to get started
5. AI nerd resources



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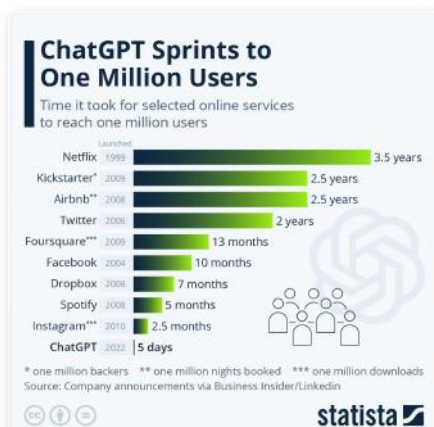
When Things Changed

- November 30, 2022
- The Large Language Model (LLM)
- Generative Pretrained Transformer (GPT)



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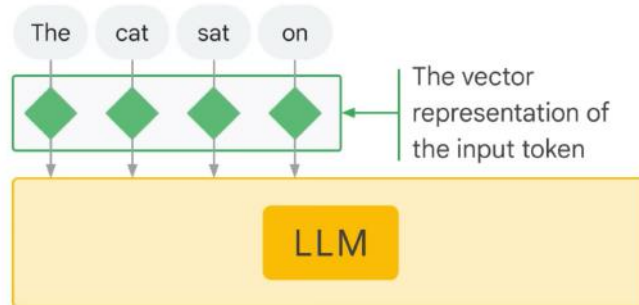
Explosive Growth – 1 Million / 100 Million



Source: UBS/Reuters; App Economy Insights

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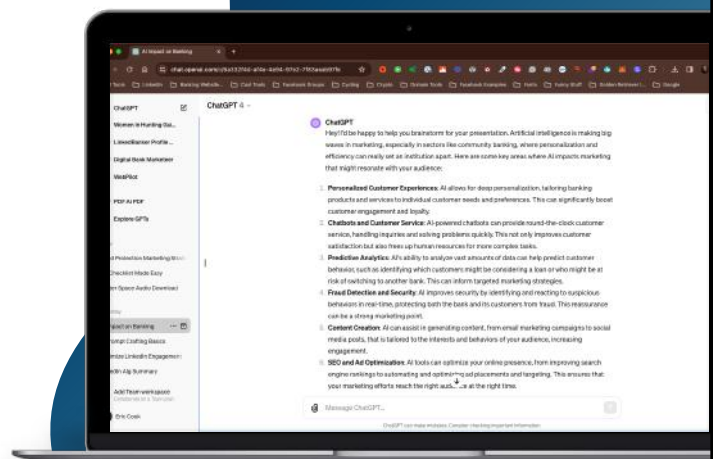
So, What's an LLM – A Prediction Machine



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What's ChatGPT Have to Say About this Topic?

- **Personalized customer experiences**
- Chatbots and customer service
- Predictive analytics
- Fraud detection and security
- **Content creation**
- **SEO and ad optimization**



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No Shortage of AI Tools

The Generative AI Market Map
A work in progress



Source: Sequoia

My Personal AI Toolkit



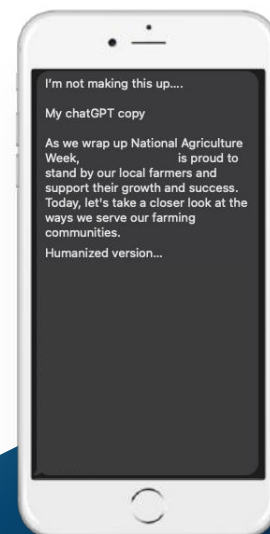
- Notetaking
- Data analysis
- Ideation/research
- Image creation
- Content creation
- Predictive ads



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It Doesn't Work All the Time

- A human (**YOU**) needs to be involved every step of the way
- **Hallucinations** are very real
- Your **expertise** can help spot issues



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Read.ai – Your Personal Notetaker/Assistant

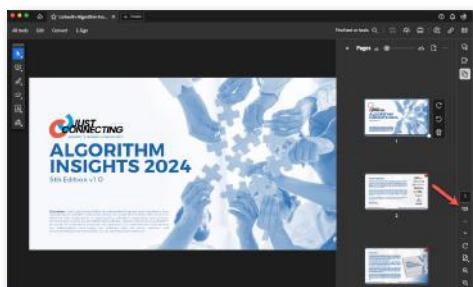
- Attends **all my meetings** Zoom, Google, Teams, etc.
- **Recaps** of conversations for immediate or future review
- Captures **tasks** and **action items**
- **AI-generated summary** and recaps your day



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Digest and Understand Large Documents



Timing Your LinkedIn™ Posts for Maximum Visibility

General Rules:

Optimal posting times hinge on your audience specifics. Generally, LinkedIn™ sees **30% of activity from 7:00 AM to 9:00 PM**. For local markets, morning postings yield prolonged exposure offering a day's worth of engagement opportunities. For a global reach, aim for 8:00 to 11:00 AM in your time zone, enabling prompt interaction. **Consistency in your posting schedule is key**, as it conditions the algorithm to serve your content reliably to your audience.

| | |
|-----------------------------------|---|
| Text Image Posts: | • Best on workdays (Mon-Fri) • Ideal Time: 8:00 - 10:30 AM |
| Document PDFs / Carousels: | • Weekdays, but shine on Tuesdays and Thursdays • Avoid Sundays |
| Polls: | • Work related topics Weekdays • Personal topics Weekends • Ideal Time: 8:00 - 10:00 AM |
| Text Only Posts: | • Effective on weekdays (Mon-Fri), except for storytelling (also weekends) • Ideal Time: 10:00 AM - 12:00 PM |
| Video Posts: | • Guides and tutorials perform well Tue-Thu; weekends are good for other types. • Ideal Time: 11:00 AM - 1:00 PM |

RESEARCH AND INSIGHTS BY RICHARD VAN DER BLOM

Eric Cook

ChatGPT can make mistakes. Consider checking important information.

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Understanding (visualizing) Large Sets of Data



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Visual Analysis and Recommendations

- Capture screenshot and upload to ChatGPT

I'd like for you to assume the role of an expert in landing page design and conversion optimization. Please review the attached screenshot of a landing page from a bank website talking about their home mortgage loans and provide me with feedback on what changes you'd recommend making to maximize the likelihood that visitors to the page take action and either start an online application or connect with one of the mortgage lenders listed on the page for personal attention. Visitors to this page are already interested in a mortgage to get a home, so suggestions on ways to pull them in and make sure they understand Dream First Bank (the name of the bank) is the right choice. If you have any questions before you get started, please let me know.



ChatGPT

I'm ready to jump into the role and provide some insights on the Dream First Bank's mortgage landing page. Let's talk about how we can fine-tune this page to really reel in those potential homeowners. From the screenshot you've provided, here's what stands out to me:

- Clear Call-to-Action (CTA):** The "Get Prequalified" button is good, but I'd suggest making it more prominent. Possibly moving it up or using a contrasting color to really make it pop. Ensure that every CTA is a no-brainer to find.
- Value Proposition:** It's vital to quickly communicate why Dream First Bank is the right choice. The page should have a clear, concise statement high up on the page that outlines the unique benefits of choosing this bank for a mortgage.
- Testimonials or Success Stories:** Real-life testimonials can be very persuasive. If there are short quote pepper those in to build trust.
- Simplify Navigation:** The top navigation is a bit busy; consider streamlining this or even removing it to minimize distractions. The goal is to keep potential customers focused on the mortgage information and CTA.
- Lender Accessibility:** The mortgage lenders are a key personal touch. Maybe include a short intro or video for each lender to make it more personal. This could help visitors feel connected and be more inclined to reach out.
- Engaging Media:** The image used is generic. A photo of people celebrating their new home or a short clip of someone receiving their house keys could elicit more emotion and drive action.
- Mobile Optimization:** Make sure this design is fully responsive. Since a lot of users will access this from their phones, you want the experience to be just as smooth on smaller screens.
- Incentives:** Highlight any special offers, like reduced fees or competitive rates, early in the page. These can be very effective in nudging people toward taking action.
- Educational Content:** Mortgage process education can be daunting. Include a simple infographic or step-by-step guide that walks users through Dream First Bank's mortgage process.
- SEO & Content Strategy:** Ensure the content is SEO-friendly with keywords that potential customers might use when searching for home mortgages. Also, keep the language clear and jargon-free.
- Tracking & Analytics:** Implement tools to track user interaction on the page to see where you're losing their attention. This will help in continuously improving the page.

Remember, the goal is to make users feel like they're already part of the Dream First family, that they're not just getting a mortgage, but a partner in their home-buying journey.

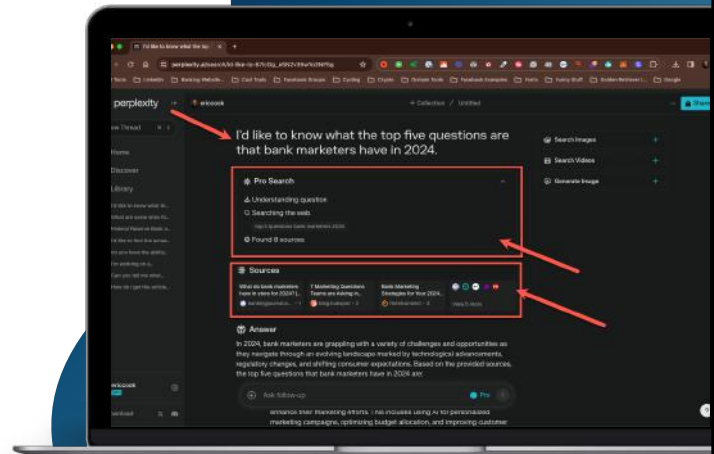
Do you have any specific goals or metrics in mind for the page conversion rates, or are there any limitations I should keep in mind while suggesting changes?

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Bye Google (search)?

- Ask it any question
- Understands the question
- Locates sources and summarizes



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Or, Just Have a Conversation and Talk it Out

- Effectively leverage AI
- Adapting to a cookie-less world
- Using storytelling and content marketing for social engagement
- Bank marketing strategies
- Ways to foster trust



What are the top five questions that bank marketers have in 2024?

Based on various sources, it seems like some of the top questions on the minds of bank marketers in 2024 revolve around topics like:

1. How can we best leverage digital channels for marketing?
2. How do we create personalized experiences for our customers?
3. How can we utilize AI and automation in our marketing strategies?
4. How can we make the most of our customer data and analytics?
5. How do we build trust and credibility with our customers?

These are just a few examples, but they highlight some of the key concerns and priorities of bank marketers as they look to the future.

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Ask with Pi



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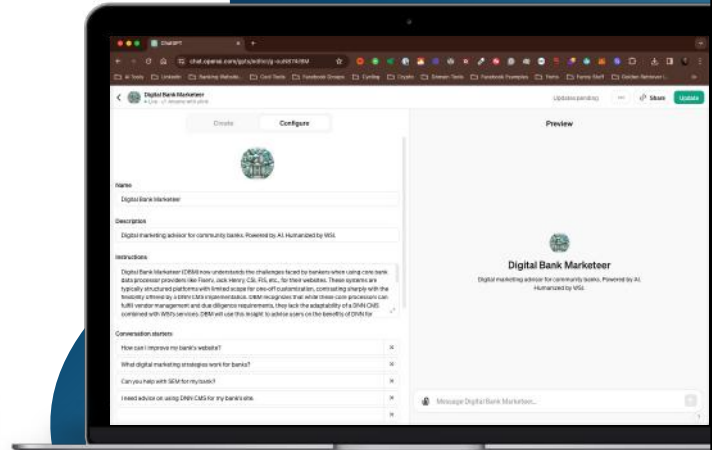
Build a Custom GPT

- English is the new programming language
- Identify a marketing challenge
- Explore GPTs > Create a GPT > Talk to it (yes, really)

GPT Builder

Hi! I'll help you build a new GPT. You can say something like, "make a creative who helps generate visuals for new products" or "make a software engineer who helps format my code."

What would you like to make?



<https://bit.ly/dbmarketeer>

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Image Creation

- Two of my go-to sites
 - Free: Ideogram
 - Paid: DALL-E 3



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Image Creation



- Two of my go-to sites
 - Free: Ideogram
 - Paid: DALL-E 3



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Image Creation



- Two of my go-to sites
 - Free: Ideogram
 - Paid: DALL-E 3



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The Power of the Prompt

1. Role and goal
 - Set the AI's persona and the purpose of the task to focus its responses.
2. Step-by-step
 - Provide clear, organized, multi-step instructions to guide the AI through the desired process.
3. Expertise
 - Incorporate your domain knowledge and perspective on how the AI should approach the task.
4. Constraints
 - Define rules or conditions that shape the AI's behavior and outputs to be more predictable and aligned with your needs.

Source: Ethan Mollick: *One Useful Thing*



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The Power of the Prompt

5. Personalization
 - Ask the AI to solicit information from the user through questions to tailor its responses to the specific context.
6. Examples
 - Provide a few sample inputs and outputs to demonstrate the desired format and content through few-shot learning.
7. Type of output
 - Explicitly specify the desired format of the AI's response, such as text, an image, a chart, or a spreadsheet.

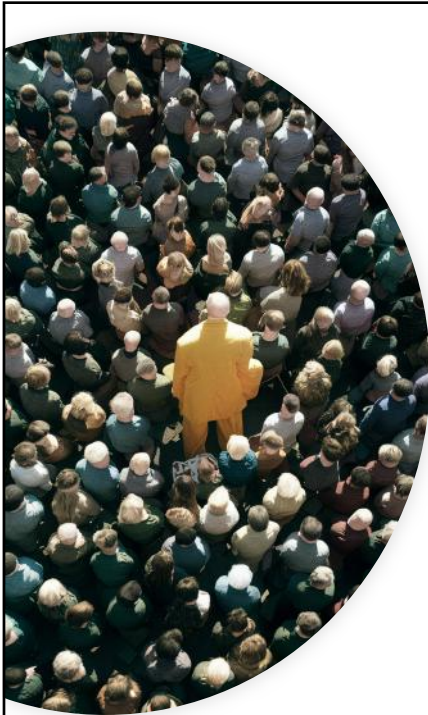


<https://bit.ly/mba7steps>

Source: Ethan Mollick: *One Useful Thing*



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How to Get Noticed

“*Authentic human content* will take on far greater value as AI-generated content floods the web.

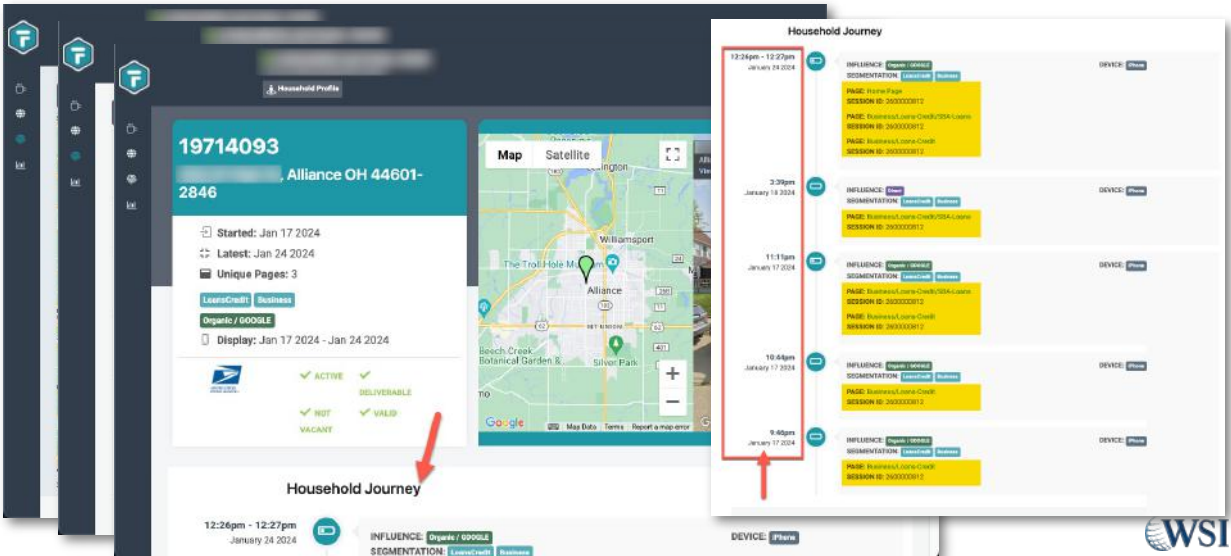
In person. Unscripted. Uniquely human. Think editorials and opinion pieces, podcasts, and live events.”

~Paul Roetzer, Marketing AI Institute



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AI Determining Propensity of Interest




The interface displays a household profile for 19714093, Alliance OH 44601-2846. It includes a map of the area and a 'Household Journey' timeline. The journey timeline shows various events and segments, with a red box highlighting a specific event on January 17, 2024, at 9:46pm. A red arrow points to the 'Household Journey' label at the bottom of the profile section.

Household Profile:

- 19714093, Alliance OH 44601-2846
- Started: Jan 17 2024
- Latest: Jan 24 2024
- Unique Pages: 3
- Organic / GOOGLE
- Display: Jan 17 2024 - Jan 24 2024
- ACTIVE, DELIVERABLE, NOT, VALID, VACANT

Household Journey:

- 12:26pm - 12:27pm January 24 2024: INFLUENCE, ORGANIC / GOOGLE, SEGMENTATION, LEADS/CREDIT, BUSINESS
- 3:27pm January 18 2024: INFLUENCE, ORGANIC / GOOGLE, SEGMENTATION, LEADS/CREDIT, BUSINESS
- 11:11pm January 17 2024: INFLUENCE, ORGANIC / GOOGLE, SEGMENTATION, LEADS/CREDIT, BUSINESS
- 10:46pm January 17 2024: INFLUENCE, ORGANIC / GOOGLE, SEGMENTATION, LEADS/CREDIT, BUSINESS
- 9:46pm January 17 2024: INFLUENCE, ORGANIC / GOOGLE, SEGMENTATION, LEADS/CREDIT, BUSINESS



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Getting AI Started

- Define purpose and scope
- Who's responsible
- Legal and compliance
- Data privacy and security
- Encourage transparency
- Establish guidelines and training
- Monitor and audit
- Consideration for other policies



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AI “Nerd” Resources

- ChatGPT eBook – WSI
- The AI Show – Podcast
- MAICON – September Conference
- Matt Wolfe – YouTube Channel
- TLDR Newsletter – Email
- AI Bootcamp – WSI



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Discussion and Keep in Touch




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Embrace Digital. Stay Human.

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