



BASYYS[®]

PROCESSING

Thank you for joining!

You are muted upon arrival.

The presentation will begin momentarily.



CREATING YOUR ANNUAL
MERCHANT SERVICES
MARKETING CALENDAR

MEET YOUR PRESENTER

PAT REDD

Director of Marketing

Pat has been with BASYS since 2016 and brings over 20 years of B2B and B2C marketing experience to the company.

As Director of Marketing, he is responsible for the ongoing development of marketing strategies that drive leads for our sales teams and business partners.



AGENDA

CREATING YOUR ANNUAL MERCHANT SERVICES MARKETING CALENDAR

Process

- Set Merchant Services Goals
- Select Marketing Campaign Dates
- Determine Marketing Channels
- Share Progress Toward Goals

A specific example from a bank partner

BASYS – an Extension of Your Marketing Department

Questions

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SET MERCHANT SERVICES GOALS

- “People with goals succeed because they know where they’re going.” – Earl Nightingale
- “Begin with the end in mind.” – Stephen Covey
- “Goals are like magnets. They’ll attract the things that make them come true.” – Tony Robbins

SET MONTHLY & ANNUAL MERCHANT SERVICES GOALS

Goals are key for successful merchant services marketing.

Options:

- # of bankers completing bootcamp training
- # of Referrals
- # of New Accounts
- \$ of Opportunity

- Per person
- Per branch
- Per market

SELECT MARKETING CAMPAIGN DATES

Frequency

- 12 months
- Quarterly
- Twice per year

Concerns

- What other initiatives are happening at the bank in other departments?
- Are there certain months when merchants are never available?
- Are there certain months when sales for merchant services / credit card processing are always great, and a campaign would have lower ROI?



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DETERMINE MARKETING CHANNELS



Website

Email

Direct Mail

Social Media

Digital Ads

Print Ads

Teller buck
slips

Statement
Stuffers

Posters /
Flyers in
Lobby

Video Screens
in Lobby

THE CREDIT CARD PROCESSING PAGE

Once you've incorporated menu items on your home page that allow users to easily navigate to the product or service they're looking for, you'll want to make sure they land on a page filled with compelling content and imagery as well.

Your *Credit Card Processing* page should provide an overview of services and benefits, along with a call to action.

Shareholder Relations | Careers | Locations | Like Us

Online Services Login
 Online Banking Username
 Enroll

Personal Business Trust Services Financial Services Resources About Us

Credit Card Processing

Personalized payment processing solutions for your business

For many consumers, using a credit or debit card is their preferred method of payment. Are you making it easy for these prospective customers to do business with you?

is here to help. We provide industry-leading payment processing solutions which are convenient, safe and affordable. Whether you are looking to start accepting credit cards or are interested in switching providers, we are here to help.

We offer cost-saving solutions for all types of businesses: Retail, Lodging, Restaurant, Business to Business, Internet/E-Commerce, Petroleum, Mobile, Mail Order/Telephone Order, etc. We'll customize and build a program specifically to fit your business needs.

Contact us

[Visit your local branch](#)

Learn more

[Educational Resources about Credit Card Processing](#)

Why partner with us?

customers enjoy:

- A dedicated account representative—call anytime you have questions!
- World-class customer support—no long hold times, and no automated systems.
- An in-house PCI Compliance team to help your business with compliance requirements.

We offer the latest in payment processing technology, customized for every type of business, from retail, to e-commerce, to mobile. Here are a few of the solutions is pleased to offer:

POS System Processing

If you need a Point of Sale system, we offer a flexible and scalable app-based POS and business management solution that can be customized to fit your unique business, and grow as your business grows.

POS System Integration

If you already have a Point of Sale system, you can securely process transactions within your current POS. We work with almost every available POS system.



5 Things to Look for When Choosing a Credit Card Processor for Your Business

5 THINGS to look for when choosing a **Credit Card Processor**

Choosing a Credit Card Processor for your business is an extremely important decision. After all, **they are handling YOUR money**.
What can you investigate in the due diligence process to ensure a credit card processor can deliver on those high expectations?

- 1 CUSTOMER SERVICE**
When you **NEED HELP**, how will you be **TREATED**?
 - Is their customer support in-house?
 - Can you dial a specific number and reach someone who can help within 30 seconds?
- 2 REPUTATION**
What is their **REPUTATION** among other businesses?
 - Can they provide letters of recommendation?
 - What is their Better Business Bureau rating?
 - Be suspicious if they cannot provide high quality references.
- 3 PCI COMPLIANCE PROCESS**
How do they handle **PCI COMPLIANCE**?

Choosing a credit card processor for your business is an extremely important decision. After all, they are handling YOUR money. Your business is relying on a credit card processor to transfer money from your customers to you, in a manner that is convenient, safe, and affordable. You are counting on your credit card processor to deposit that money in your bank account consistently, accurately, and worry-free; while safeguarding your customer's personal information; and for an amount that allows you to maintain healthy profit margins.

What can you investigate in the due diligence process to ensure a credit card processor can deliver on those high expectations? Here are 5 things to look for when choosing a credit card processor.

1. Customer Service

When you need help, how will you be treated? Do you call an outsourced call center and wait on hold? Do

Contact Us

Together, let's find the best solution for your payment processing needs.

First Name

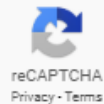
Last Name

Phone Number

Email

By filling out this form, you agree to be contacted by [REDACTED]

I'm not a robot



Submit

CALL TO ACTION ON THE LANDING PAGE

To entice users to take the next step and reach out to you, your landing page *must ask them to take action*. This can be done two ways:

1. Form (recommended)
2. Name, Phone #, Email address

DETERMINE MARKETING CHANNELS



Website

Email

Direct Mail

Social Media

Digital Ads

Print Ads

Teller buck
slips

Statement
Stuffers

Posters /
Flyers in
Lobby

Video Screens
in Lobby

MARKETING CHANNELS

- Email
 - Do you have a good list?
 - Do you have a program for distribution:
 - Marketo, Act-On, Pardot
 - Constant Contact, Mailchimp
- Direct Mail
 - Do you have a good list?
- Social Media
 - LinkedIn
 - Facebook
 - Twitter





MARKETING CHANNELS

WHAT CHANNELS DO YOU ALREADY USE FOR BANK MARKETING?

- Digital Ads
 - Google Ads
 - Local / Regional website
 - Bank website
 - Online Banking
 - Mobile Banking
 - Others?
- Print Ads
 - Local / Regional Newspaper
 - Local / Regional Magazine

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Direct Mail

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slips

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in Lobby

MARKETING CHANNELS

- Teller Buck Slips
 - Lobby
 - Drive-Thru
- Statement Stuffers
 - Print
 - Digital
- Posters / Flyers in the Lobby
 - Stanchions
 - Teller stations
 - Desks
- Video Screens in the Lobby



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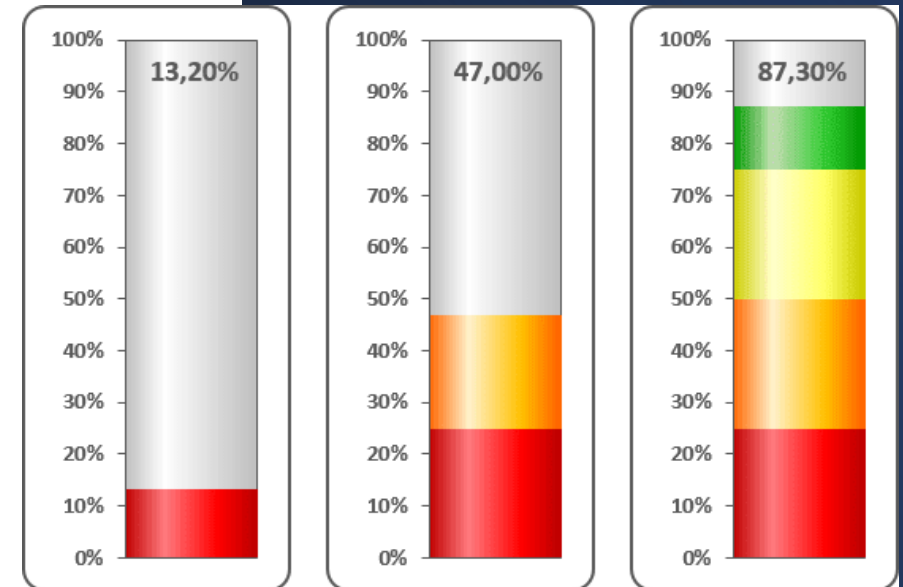
A specific example from a bank partner

BASYS – an Extension of Your Marketing Department

Questions

SHARE PROGRESS TOWARD GOALS

- Throughout all marketing, sales is continuing with meetings and phone calls.
- An essential part of a successful marketing campaign is internal communication
 - At least monthly – more often if possible
 - % of goal attained
 - Marketing campaign updates
 - Marketing samples if available
- Examples:
 - It's been 1 month and we have achieved 10% of our goal – nice start! Another email and another direct mail piece launch next week. See samples attached.
 - It's been 3 months and we are at 23% of goal – a little behind – keep those referrals coming! The new social media campaign kicks off in two weeks. See samples attached.
 - It's been 6 months and we are at 57% of goal – a little ahead – great job! keep it up! Another round of statement stuffers goes out at the 1st of the month. See sample attached.
 - 30 days left, 7% to go. Our last email and direct mail campaigns for this year go out tomorrow. See samples attached.



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EXAMPLE – page 1

- Goal:
 - 4 Statements per person, per month - minimum \$20k per month in processing
 - Win 50% of those deals
- Marketing Campaign – two times during the year
 - March 1 through May 31
 - Content: 5 Things to Look for in a Credit Card Processor
 - September 1 through November 30
 - Content: What SHOULD Happen when you contact Customer Support
- Campaign Elements
 - ACH List
 - Incentive Campaign
 - Website – Content Landing Page
 - Email
 - Social Media
 - Teller Buckslips
 - Video Screens in Lobby



EXAMPLE – page 2

Timeline – Campaign #1 – 03/01 thru 05/31

- Feb
 - Website – Content Landing Page
 - Pull ACH List from 1/01/22 through 1/31/22 to determine target customers for Email & Direct Mail
 - Write and design all elements – email, direct mail, social media, teller buckslips, video screens, incentive campaign
- Last week of February
 - Kick-off meetings in person
 - 1 for retail / teller team
 - 1 for commercial loan team
- March
 - Email #1
 - Direct mail #1
 - Social Media posts every two weeks
 - Teller buck slips in lobby and drive through
 - Video on screens in lobby – in rotation with 2 other bank products



EXAMPLE – page 3

Timeline – Campaign #1 – 03/01 thru 05/31 (continued)

- April
 - Email #2
 - Social Media posts every two weeks
 - Teller buck slips in lobby and drive through
 - Video on screens in lobby – in rotation with 3 other bank products
- May
 - Email #3
 - Direct Mail #2
 - Social Media posts every two weeks
 - Teller buck slips in lobby and drive through
 - Video on screens in lobby – in rotation with 2 other bank products
- Timeline – Campaign #2 – 09/01 thru 11/30
 - Repeat process from above, starting in August



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A collage of marketing-related items including a pie chart, a clock, a gear, a document with '20%' written on it, and a large green arrow pointing up. The word 'MARKETING' is written in large, bold, black letters across the middle, and 'SERVICE' is written in white on a green oval at the bottom.

BASYS – AN EXTENSION OF YOUR MARKETING DEPARTMENT

- Content
 - Blogs
 - Infographics
 - Videos
- Landing Pages
- Email
- Social Media
- Direct Mail
- Flyer / Brochure Design
- Print Ad Design
- Digital Ad Design
- Videos for Lobby Screens

Questions?

BASYS[®]

PROCESSING

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BASYS IS YOUR PARTNER

We want to work with you to grow your merchant portfolio.

To get started, reach out to your Partner Support Manager, or Pat Redd, Director of Marketing.

Thank you for your time!

BASYS[®]
P R O C E S S I N G

basyspro.com

Pat Redd

Director of Marketing



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