



# Beneficial State Bank

## Marketing & Execution Strategies *Signage and Writing Processes*



Information on how to approach vendor selection for signage and writing guest articles for brand awareness.



# Signage Update.



Steps	Inputs	Deliverables	Dependencies
1	Review existing signage	<ul style="list-style-type: none"><li>• Understanding of how the new signage will create consistency in layout and design to create a cohesive identity.</li><li>• Observe to see if signage is:<ul style="list-style-type: none"><li>◦ Legible from great distance</li><li>◦ Adequate scale and location</li><li>◦ Recognizable wordmark</li><li>◦ Partially obscured</li></ul></li></ul>	Access to photos of signage across locations in day and night settings in various angles and distances.
2	Pre-planning	<ul style="list-style-type: none"><li>• Planning Meeting: project team members meet to discuss objectives for alignment</li><li>• Typology Planning: review and discuss logos for usage and brainstorm signage for each location.</li></ul>	Set deadline and follow up meeting to discuss deliverables; an opportunity to share ideas and any concerns surrounding the project.

# Inputs, Deliverables, and Dependencies.

Steps	Inputs	Deliverables	Dependencies
3	Site Planning	<ul style="list-style-type: none"><li>• Site documentation: find existing signage dimensions and identify potential locations for additional signage</li><li>• Locate site barriers, utilities and rights-of-way</li><li>• Cross reference with building owner to see if there are signage restrictions in-place</li></ul>	<p>Communication with vendor that created existing signage to find out dimensions and further details on the past project.</p> <ul style="list-style-type: none"><li>• If not available, reach out to a potential vendor to get measurements of the signage.</li></ul> <p>Communication with building owners</p>
4	Layout Development	<ul style="list-style-type: none"><li>• Design: Draft signage mockups for each location for review.<ul style="list-style-type: none"><li>◦ Designs are edited for brevity, composition, and layout.</li></ul></li></ul>	<p>Understanding of the design strategy for the chosen logo placements and in accordance with branding guidelines.</p>
5	Construction Documents	<ul style="list-style-type: none"><li>• Construction Drawings: The final design should be converted to the necessary software file formats for manufacturing. This may include the creation of AI files, CAD drawings, the conversion of text to outlines to ensure proper typography details and the development of site-specific installation details.</li><li>• Show chosen location and installation details for new signage.</li></ul>	<p>Receive renderings and dimensions for each location for accuracy and placement for logos and designs.</p>
6	Plan Finalization	<ul style="list-style-type: none"><li>• After the necessary approvals have been made, the files need to be prepared for distribution to contractors and manufacturers for production.</li><li>• Once installation is complete, the construction documents should be archived for future reference.</li></ul>	<p>Approvals from the project team to move forward to final steps in installation.</p>



# Signage Update.

## Location and Project Considerations

- There should be consistency for all graphic elements incorporating the Beneficial State Bank trademark.
- Material Selection
  - Materials used to construct the signage
  - Simplicity of installation
  - Ease of maintenance
  - Minimal maintenance costs
  - Vandal Resistance
  - Influence of weather conditions and UV radiation
- Understanding of signage restrictions with owners of the commercial buildings that State Beneficial Bank leases at
  - Does the owner prohibit certain signage?
  - Is there opportunity to implement different types of signage?
  - Example: Can there be an introduction of LED signs for external or internal usage.
    - Note: This can allow for more flexible messaging while keeping costs low long term.





# Choosing a Vendor.

## When choosing a vendor, below are the questions to ask & things to consider:

- Research vendor's credibility and reputation for comparison. What do their customers say about them?
- How much do they charge for the service? Are they within the allocated budget?
- Can the vendor complete your requirements in a timely fashion?
- With multiple locations across the country, can the vendor provide servicing for all the branches?
  - *Does the vendor offer a discount for buying in larger quantities?*
- If issues arise, can the vendor service the signs?
- Does the vendor provide a warranty for their services?
- Is the vendor's customer service quick to respond and knowledgeable?
- What are the quality management processes in place to ensure consistency of quality and meeting deadlines?
- Can the vendor provide referrals or work samples?
- What are the payment terms and conditions?
- Does the vendor offer variety in signage, in regards, to budgeting needs?
  - *Do they have options that might reduce the cost?*





# Choosing a Vendor.

## Questions to ask references.

- Were you happy with their performance during the project?
  - Ask follow-up questions to understand how they handled conflict, miscommunications, and alignment.
- Did the vendor provide everything you expected in the initial project, or were there unplanned follow-on projects proposed to complete work you thought was already included?
- Did they complete the project within the original cost and timeline estimate provided prior to contract execution?
- Was there an increase in the budget due to a “scope change?”
  - This gives insight into how good a job the vendor does understanding what you want and need before agreeing to the scope you contract them to do.
- Do you still work with the vendor today?
- If you could do it all again, is there anything you would do differently before the contract is signed or during the process?



# Choosing a Vendor.

**Check online for reviews and work examples.**

## **Online Testimonials**

- Example: Check Yelp and Google to look at the company's listing.
  - See if the business has a valid trade license to see if they are qualified for the project.
  - Look at customer testimonials to see if the vendor has great customer service and are reliable.
- Look at Work Samples
  - At times, customers may leave photo reviews showing the vendor's work. Check to see if the work shown is up to par with company standards required for this project.



# Vendor Considerations.

## Pragmatic Considerations

- Questions to Ask Vendor
  - Will the vendor pass a compliance screening?
    - A vendor analysis determines whether a vendor complies with the law and engages in ethical business practices. It's not safe to assume.
  - Does the vendor share the same values as Beneficial State Bank?
    - The company is committed to the environment, so ask about vendor's policies around sustainability to ensure they meet brand standards. For example, where are the products sourced?

## Impact Considerations

- Can the vendor complete your requirements in a timely fashion?
- With multiple locations across the country, can the vendor provide servicing for all the branches?
- If issues arise, can the vendor service the signs?
- Does the vendor provide a warranty for their services?

# Strategy: Writing Articles For Brand Awareness.

## For Beneficial State Bank Team

- Review previous articles and blog posts from Beneficial State Bank to identify the following:
  - The tone and voice for consistent messaging. I want to read existing materials to learn what the team likes.
  - Learn what blog have been most successful.
- Select engaging topic that Beneficial State Bank has not already posted on USGBC.
- Outline expectations and CTA (call to action) if any.

## For Blog and/or News Outline

- Deadline and deliverables for blog post and materials
- Information on the blog's audience
  - The more developed the target audience is, the easier it is to craft a message that delivers.
- What are the most important problems facing this audience?
- Ask which past blog posts have generated the most interest and engagement for this audience.





# Post Outline.

## Select a Topic to Write About

- Make a list of potential topics before writing.
- If possible, brainstorm ideas with the team to see which topic can evoke interest from potential customers.
- Identify Target Audience
- Utilize keyword research tools to get an idea of what are the most searched terms to help find the proper topic for the blog post.

## Create a SWOT analysis to understand the target market of blog.

- Factors to look for when searching for the target audience:
  - Demographics
  - Behaviors and interests
  - Buying Habits



# Post Outline.

## Research Facts That Reinforce The Story

- Having the facts is essential to writing an educational story that captivates a reader.
- Some examples I would be interested in including:
  - Statistics
  - Quotes from sources related to the topic
  - Local or national events
  - Resources that a reader might find helpful
- **Create the Outline for the Article**
  - The four main pieces of an outline:
    - Title: Write content that targets the rich snippet at the top of the search engine result page to increase its viewership.
    - Intro paragraph: Introduce the main point of what you're trying to say about a topic while exhibiting value to persuade the reader to continue reading your piece.
    - Body paragraph: Construct and organize supporting information to support the point you're trying to make.
    - Conclusion: This paragraph serves as the call to action for the reader to consider in the future.



# Post Outline.

- **Write a Rough Draft and Revise the Outline**
  - a. Write everything down before editing to creatively write.
  - b. Revise to enhance the article's quality and which sections you plan on elaborating more on.
- **Specify The Subject Matter**
  - a. Break down the key points or each section of the outline to stay on track with your article.
- **Make Sure the Draft is Error-Free**
  - a. Utilize Grammarly to make sure the writing is free of grammar, punctuation, and spelling errors. In addition, the application provides suggestions for style and clarity that best fits the audience.
  - b. If possible, have a team member proofread the article as well to ensure it fits the company's voice.



# Outline For Blog About Earth Day.

## Example Topic: Five Banking Tips for Earth Day

### A. Introduction

- a. Explanation of Earth Day
- b. Importance of taking action to protect the environment
- c. Teaser: Adopting these five banking tips can help individuals contribute to a sustainable future.

### B. Banking Tips for Earth Day

- a. Use Online Banking
  - i. Explanation of how online banking reduces paper waste
  - ii. Benefits of online banking for both the environment and personal finance management
- b. Choose a Green Bank
  - i. Explanation of what a green bank is
  - ii. Benefits of using a green bank, such as supporting sustainable projects and avoiding investing in environmentally harmful industries
  - iii. Recommendation of Beneficial State Bank
- c. Switch to E-Statements
  - i. Explanation of how e-statements reduce paper waste
  - ii. Benefits of e-statements, such as convenience and reducing the risk of identity theft
- d. Get Involved With Local Environmental Organizations
  - i. Explanation of the importance of volunteering to help safeguard the environment
  - ii. Recommendations on how to find local organizations to support and/or volunteer at.
- e. Invest in Green Funds
  - i. Explanation of what green funds are and how they work
  - ii. Benefits of investing in green funds, such as contributing to sustainable development and potentially earning higher returns

### C. Conclusion

- a. Reiterate Banking Tips
- b. Mention How One Can Sign Up With Beneficial State Bank
  - i. Mention various ways the bank can be of help for banking needs.



# Blog Paragraph Idea #1.



## **Paragraph: Find a Bank that Cares for the Environment**

Align your banking where your values are. Six years after the Paris Agreement, the world's largest banks have collectively [financed \\$4.6 trillion](#) in fossil fuel companies, with \$742 billion in fossil fuel financing in 2021 alone. Make a personal impact on the planet by transferring from a bank funding climate crisis into an ethical bank. Beneficial State Bank ensures your transactions are doing good for the world. The firm envisions a more equitable economy and industry by prioritizing a triple bottom line: people, planet, and prosperity for all.

## **Protect People and Planet**

Beneficial State Bank is here to make sure your transactions support clean energy systems of various sources and consciously seek to avoid fossil fuels. The goal? Accelerate global decarbonization and the transition to a net-zero economy. Beneficial State Bank is empowering people to consider their carbon impact. Through its partnership with Aspiration, the bank offers a credit card that plants trees for customers with every purchase. This partnership has resulted in over 175,000 trees planted and 1,300 kilos of avoided plastics.

## **Loans That Make a Difference**

As a certified B-Corp, you can trust Beneficial State Bank -- a mission-driven community bank -- is working to benefit people and the planet. Serving California, Oregon, and Washington, Beneficial State Bank supported businesses and organizations with \$762 million in loans in 2021 that went towards affordable housing, environmental sustainability, fair auto loans, and other community initiatives. At least 75% of the lending goes toward mission-aligned loans, and 0% supports contra-mission loans. Beyond dependable and permanent climate impact, the firm practices beneficial banking that invests in social justice, financial equity, and environmental well-being to create a sustainable and inclusive economy.

Ready to bank with purpose? [Open your account with Beneficial State Bank today.](#)



## Blog Paragraph Idea #2.

### **Paragraph: Find a Bank that Cares for the Environment**

Your banking approach and investments are another important part of the equation as you start - or continue - your push for green finances. A green investment strategy should consider not only potential financial returns, but also whether the business practices behind these investments also have environmental and social benefits.

Six years after the Paris Agreement, the world's largest banks have collectively financed \$4.6 trillion in fossil fuel companies with \$742 billion in fossil fuel financing in 2021 alone. Fossil fuels produce huge levels of carbon emissions polluting the air, water, and soil. And, the fuels can lead to serious health impacts and economic losses. Banks can use the money from deposit accounts to make a wide range of loans, from personal loans to small business loans and even large-scale commercial loans, in order to profit. As a customer, you have no direct say in how your bank utilizes your deposits. So, you may end up indirectly supporting activities you may disagree with like the funding of fracking, deforestation, and pipeline development through indigenous lands.

Finding a bank that cares for the environment is not difficult, but it does require research. Look for environmental policies, green certifications, sustainable investments, community initiatives, and eco-friendly technology when considering banks. Remember, your money has power, and by banking with an institution that prioritizes the environment, you are helping to preserve the planet for future generations.

There is a bank that is built on the principle of investing in the environment and local communities. Founded in 2007 to challenge the business model of the banking system, Beneficial State Bank has made public commitments to align their funds with climate targets. As a value-based bank, Beneficial State Bank prioritizes a triple-bottom-line: people, planet, and prosperity for all. The firm provides loans to finance clean energy projects, net-zero building construction, and supporting environmentally focused nonprofit organizations. To learn more about the ethical banking of Beneficial State Bank and how it can serve your needs, [click here](#).