

AT THE TOP OF OUR GAME

2009 National Credit Union Marketing Spectrum
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The Westin Bayshore
Vancouver, British Columbia

WORKSHOP: MARKETING TO BOOMERS ONLINE

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Worksheets

- 1. Organizational audit – do we really believe in this market?**
- 2. Content audit – what do we have to say to them?**
- 3. Internet checklist**

Worksheet 1. Organizational audit – do we really believe in this market?

Indicate your agreement or disagreement with each of the statements below.
Enter 5 if you strongly agree with the statement, 4 if you somewhat agree, 3 if you're not sure, 2 if you somewhat disagree, and 1 if you strongly disagree.

1. Boomers already represent an important market for my organization. _____
2. The target market specified by our media advertising buys is Adults 18-34. _____
3. Most of the people in our marketing department are 40 or under. _____
4. We have a strong training program in place to teach our field people about the needs and wants of Boomers and Seniors. _____
5. I have had several articles sent to me in the past three months from other members of our organization dealing with the aging of the population and what it means for our business. _____
6. I have bookmarked www.50plus.com on my Internet browser because I want to see what Boomers are reading about. _____
7. I subscribe to both Zoomer Magazine and AARP magazine because I want to see what these organizations are doing. _____
8. In the past year, senior members of our organization have attended at least one seminar or conference dealing specifically with Boomers and aging. _____
9. Our HR department has a formal program in place to capture the knowledge of people who are retiring from our organization and to have them mentor younger workers. _____
10. Our product and service literature is always designed to take account of Boomer needs and wants. _____
11. We have existing programs going on in our organization right now to research and plan how we can better serve the Boomers and seniors markets. _____
12. Our marketing plans focus on creating brand loyalty among younger consumers. We believe Boomers' brand loyalties are already set. _____



Worksheet 2. Content audit – what do we have to say to them?

Key driver	What do we offer?	Can we communicate it?
Health and well being		
Quality of life		
Feeling of youthfulness		
Opportunity to explore, discover		
Independent living		
Fashion, style, sex appeal		
Exceptionally high levels of service		
Convenience		



3. Internet checklist

Internet element	Ideas, notes, observations
Web site → Microsite	
SEO and Google ad words	
Advertorials	
Geotargeted advertising	
Interactive help tools	
Content sharing and other partnerships	
Dialogue – forums, social media	
E-newsletters	
Line extensions – travel, real estate	
Internal communications	



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