

Key Marketing Principles

N O A H C I S N E R O S



The most impactful lessons I've learned

I am grateful to have received an incredible education and mentorship during my career. As I continue to build momentum, I wanted to annotate some of the most impactful lessons I have gained in marketing.

You do not need experience to think strategically.

You do not need experience to nail the campaign.

You need advice, insight, data, and history.

Here are some of the most impactful elements I have learned...



Value Proposition

Without a simple, solid, concrete, value proposition that clearly explains why any client should engage with you, your marketing efforts will be pointless.

B2B Product Value Prop. Example:

We Provide **Financial Solutions** For **Businesses** To Solve Their **Cash Flow Needs** So They Can Continue To **Grow & Operate.**

What

Who

How

Why



Value Proposition Cont.

I had an incredible professor who had a fantastic equation that I have highlighted below:

Jonathan Oomrigar's Value Proposition Template.

VALUE PROPOSITION TEMPLATE

Easy, Simple, Comprehensive – Show Customers You Heard Them

If we do buy (your business or product) instead of (our Next Best Alternative) we get not only (a required point of parity, if necessary) but more importantly, we get (some compelling points(s) of difference, maximum 2) that is worth (\$X) because you (do or have something not one else does or has) and get it we must (pay and /or do something)



My Value Prop. Template

We Provide ... For ... To
Solve Their ... So They
Can Continue To

What

Who

How

Why



Positioning

Positioning matters, especially when evaluating your points of parity vs. points of differentiation.

Positioning is NOT the same as a value prop.

I had a professor who shared this formula for determining a strong brand positioning.

Andrea Thomas' Brand Positioning Template:

BRAND POSITIONING STATEMENT

"To (targeted consumer), (the brand) is the (point of difference) among all (frame of reference) because (reasons to believe)."

Creative: Emotion

Utilizing emotional storytelling is critical when developing your creative. For some reason, B2B marketers seem to think this does not apply to them.

News Flash: **B2B Marketing does not need to be boring.**

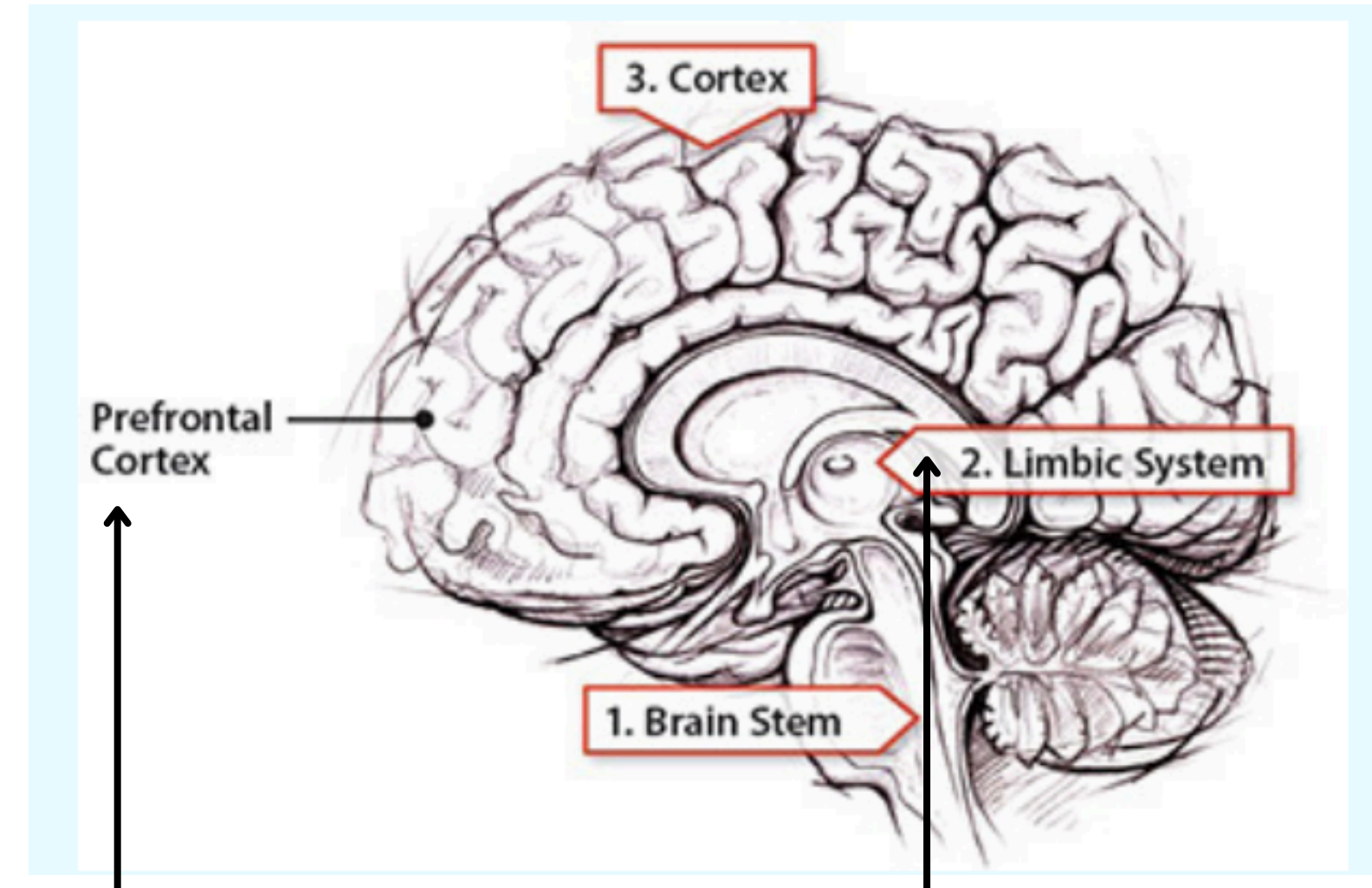
You still need to connect it to your client's identity.

The product, the service, and the loan may all be simple, practical, and a commodity.

You still can use emotion with your storytelling. Use less product-marketing and more value-based marketing. Why?

Because people make business decisions with emotion, even if they refuse to believe that they do.

Why? Because emotion is deeper than logic. **You feel before you can reason.** Literally.

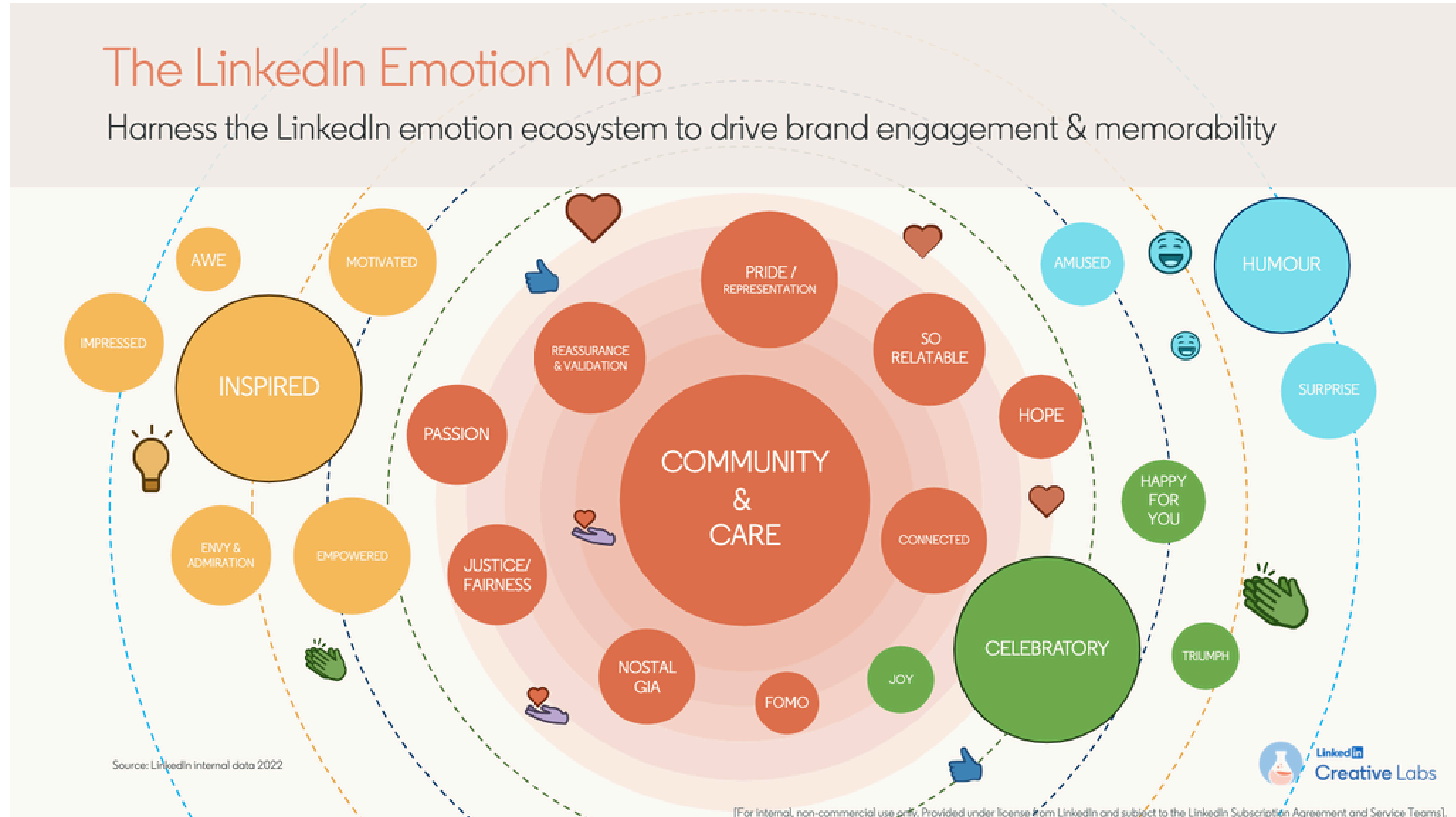


The part of your
brain that makes
decisions

The part of your
brain that feels
emotion

Creative: Form the Connection

Know what emotions connect to other emotions. The B2B LinkedIn Institute did research to create the following emotion map:





Creative: It Needs To Convert

Branding matters! Now, many do not trust that statement as too many failed advertisers focus on art, not revenue.

If you want to be an artist, go paint. If you want to make money, go market.

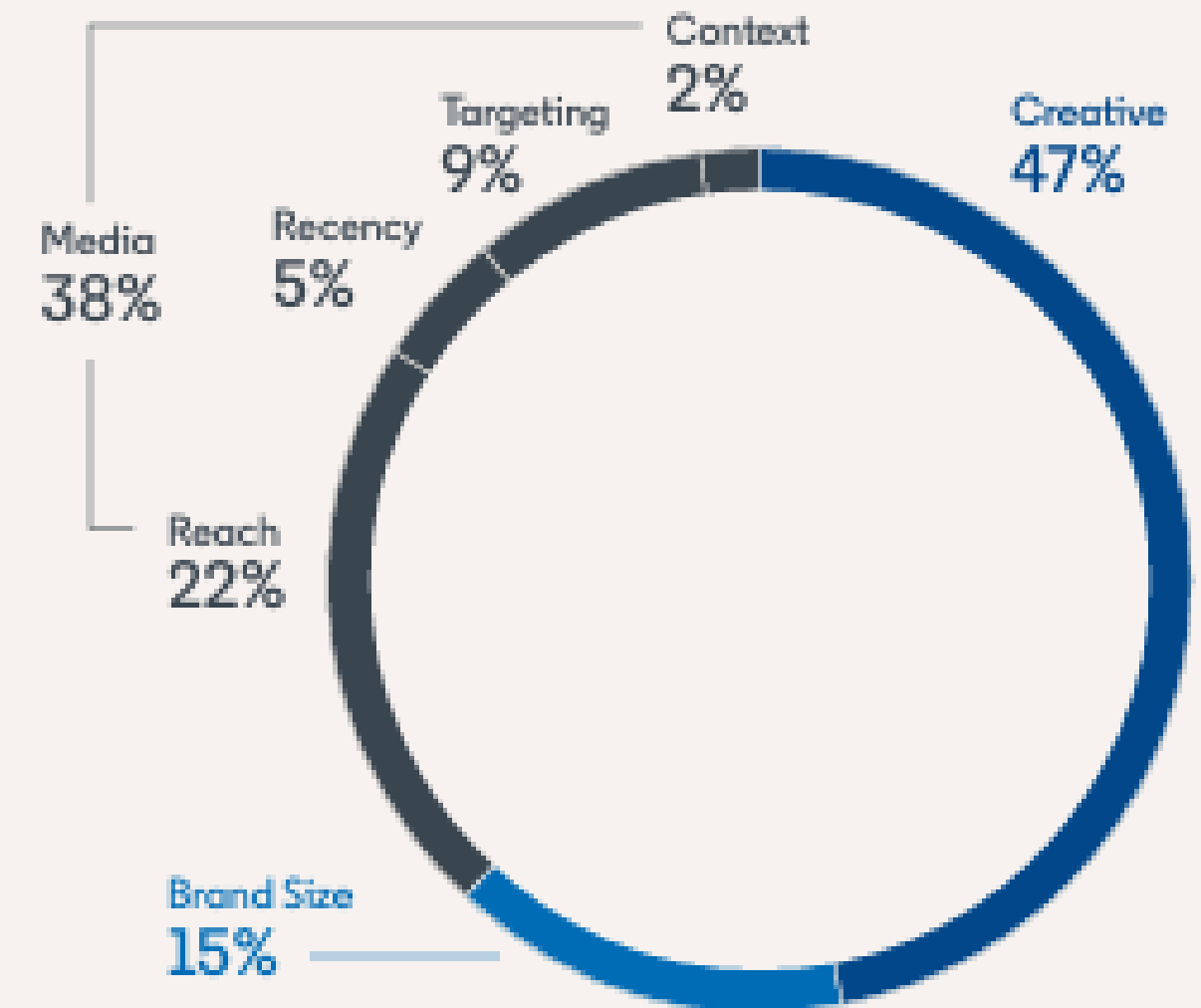
Good creative matters, but only if it converts. Performance marketers think it is all about media. **WRONG!**

You need both. You need **performance branding**. Use the equation to help justify this stance:

Creative × Media = Outcomes (CMO)

Creative (47%) and Media (38%) are the two key inputs that contribute to advertising performance.

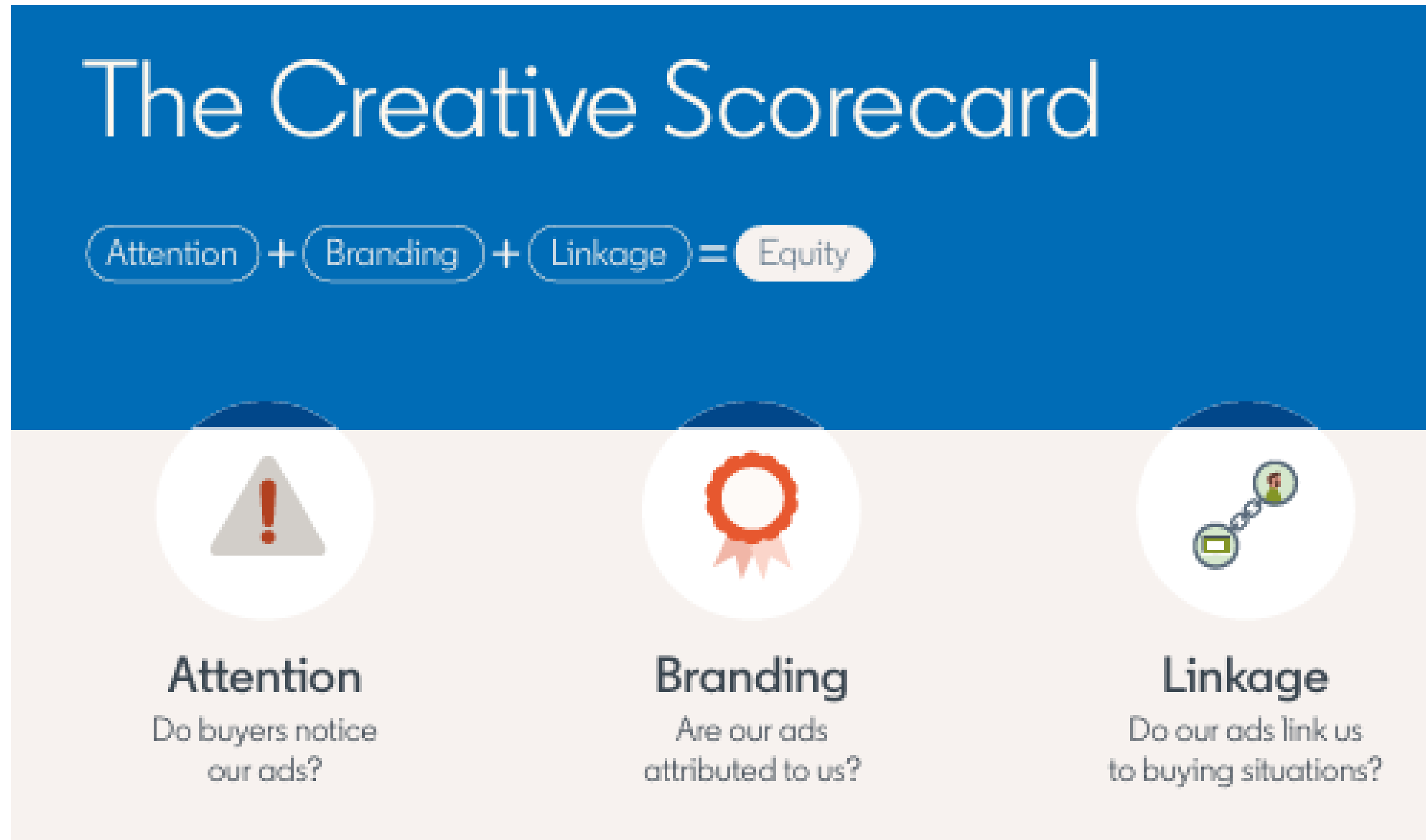
Source: Nielsen Catalina Solutions 2017, 500 Campaigns Across All Media





Creative: It Needs To Convert

Any content, any creative, be it paid or organic, is a failure if it does not do the following three things:





Content Must Offer Value

WHAT CONTENT OFFERS VALUE?

1.

EDUCATION

2.

ENTERTAINMENT

3.

INSPIRATION



Content Must Build Trust

COMMON TRUST FACTORS

Social Proof

REVIEWS, case studies, etc.

Safety Logos

BBB, FDIC, etc.

Experience Indicators

25 Years Of Business, industry
knowledge

Brand Values

Transparency, communication,
etc.

TOP OF MIND

Word Of Mouth

Relationships matter, partners matter,
friend's opinions matter.



Content Must Build Trust: Examples



"At Everee, our innovative payroll model lets businesses pay their workers every day, and we couldn't do it without TAB Bank. Their rock-solid reliability in processing millions of transactions every month gives us total confidence, while their understanding of our vision fuels our ability to disrupt traditional payroll systems. TAB Bank is more than a partner —they're a key to our success."

— Tyler Ploeger, Co-Founder and CFO of Everee



Steel Capital Management

"TAB Bank has been a pleasure to work with throughout the due diligence, documentation, and closing process. The TAB Bank team's willingness to fit our flexible financing needs demonstrated their commitment to building a long and successful partnership with Steel Capital. We're confident we've found the right partner to continue Steel's growth."

— Michael Hoffman, co-CEO of Steel Capital Management



CoreCentric Solutions

"The TAB Bank team's collaboration, commitment and professionalism demonstrated the organization's commitment to building a long and successful partnership, which we at CoreCentric Solutions value highly and look forward to growing."

— Sarah Chalawa, CFO at CoreCentric Solutions

Disclaimer: I am an employee of TAB Bank. The postings on this site are my own and do not necessarily reflect the views of TAB Bank or other TAB Bank employees. No TAB Bank products, rates, or services are offered on this website or by me in any form at any time.



Build Trust: Humanize The Brand

Meet Our Business Banking Experts

We believe in the power of personal relationships. That's why every TAB Bank client is paired with a dedicated advisor who gets to know your business inside and out.



Daylen Bills
Treasury Services Manager

Daylen is a service-oriented team leader with a contagious work ethic and penchant for developing inclusive, engaging, work cultures. He has experience



Jeff Hansen
Vice President of Treasury Management Services

Jeff is a dedicated hard worker who takes pride in solving problems and helping clients find ways to grow. He has a professional



Miranda Hancock
TMS Onboarding Specialist

Miranda has over 15 years of banking experience and is dedicated to enhancing



Curtis Sutherland

Head of Sales and Business Development



Curtis Sutherland is a highly experienced ABL professional with over 20 years of success in sales and portfolio management. Throughout his career, Curtis has built a reputation for developing innovative and practical solutions to complex financial challenges. His deep understanding of the lending landscape, combined with a client-first mindset, makes him a valuable resource for businesses seeking flexible financing options. Beyond the professional world, Curtis is a devoted family man who enjoys spending his free time outdoors—whether camping, golfing, or simply appreciating nature—as a way to recharge and stay grounded in a fast-paced industry.

[Get in Touch With Curtis](#)

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Targeting: Psychographics

How do you target a space where demographics cannot be targeted?

You utilize psychographics.

Dictionary

Definitions from [Oxford Languages](#) · [Learn more](#)



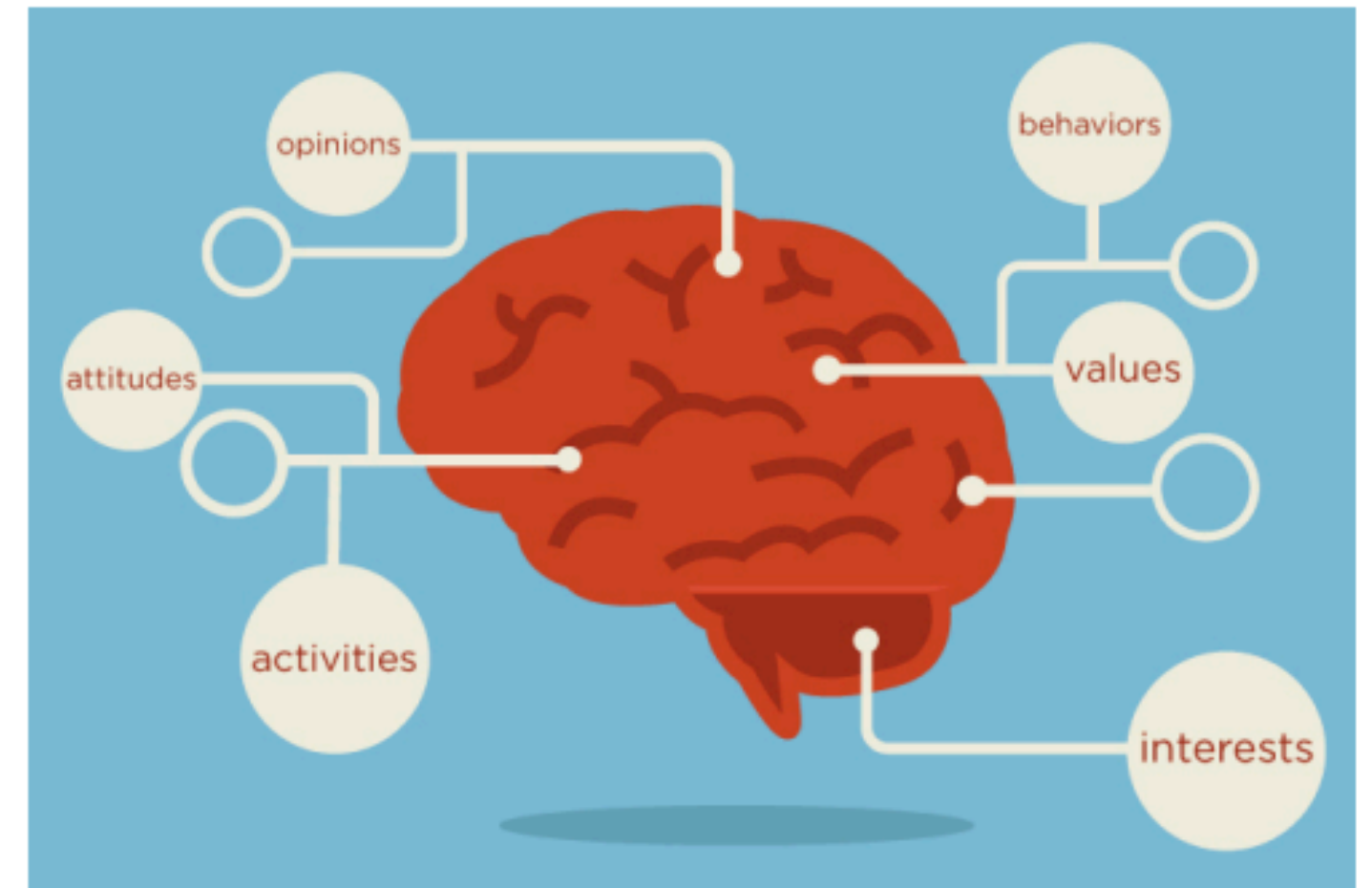
psy·cho·graph·ics

/ˌsɪkəˈɡræfiks/

noun

the study and classification of people according to their attitudes, aspirations, and other psychological criteria, especially in market research.

PSYCHOGRAPHIC



Source: wordstream.com

How does my client think?

What are my client's hobbies?

Why car does my client drive?

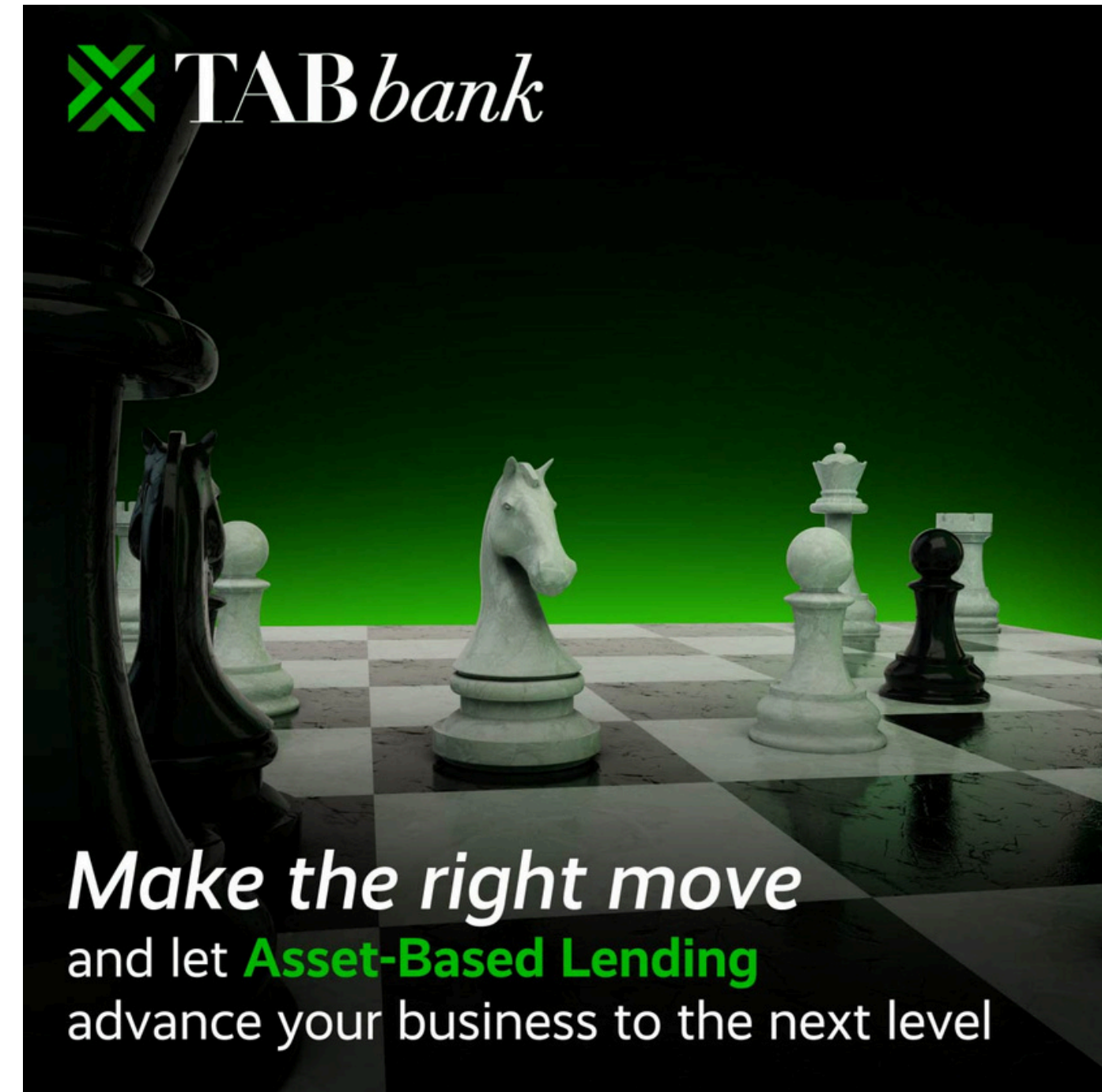
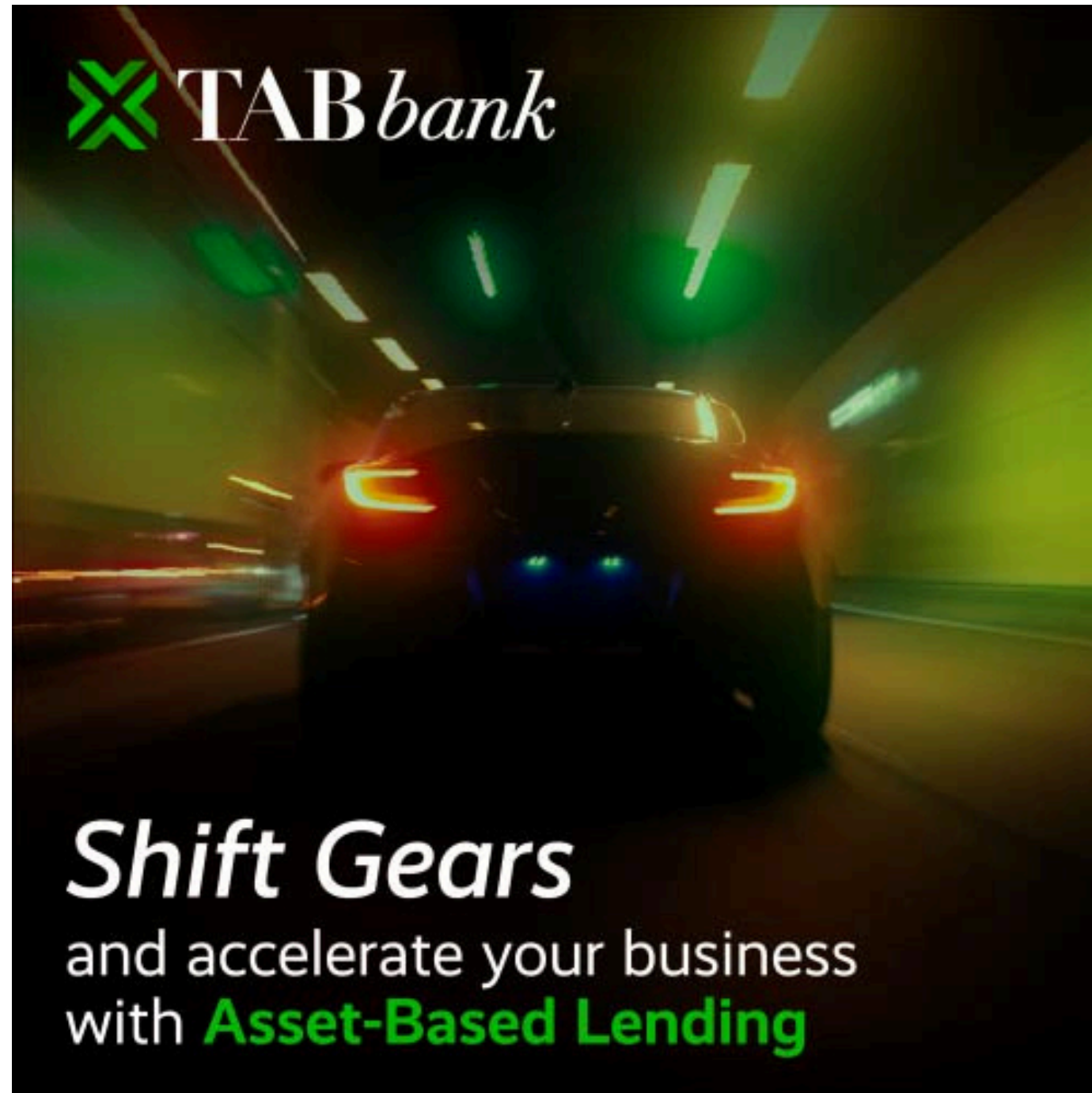
What attitude does my client have?

What behaviors does my client have?

What does a "day in the life" of my client look like?



Psychographics: Creative Exmample



Targeting: Data

ABM Data: Utilizing tools like ZoomInfo, you can filter, vet, and funnel accounts/contacts that fit your criteria more closely using firmographic data.

Using **funnel movement** lists can empower retargeting in multi-channel/multi-touch campaigns.

Data Training: You can use quality leads, closed deals, current ideal clients, and past clients to train machine learning (digital advertising) for the kind of prospect you want.

You could use predictive, lookalike, or in-market models to do this. Also, simply teaching the platforms what contact constitutes **higher value to you** can improve results.

The reverse is also true. You can teach models not to go after by feeding them low-quality leads as contacts to avoid/exclude.





The Three

One to One: You are looking for one client and invest all of your marketing finding that one client for your firm. This may be important for a startup with high-ticket products.

One to Few: You are looking for a few, specific, clients to invest all of your marketing finding. You are more narrow than traditional marketing or funnel marketing, but you see the need for more than one client.

One to Many: This is a targeted net approach where you use your Ideal Customer Profiles for targeting, but you are not specific about what business, and give fairly loose parameters. This requires less sales collaboration.

Mindshare Leads to Marketshare

“Mental availability is about making your brand known and easily thought of in buying situations.”

Professor Jenni Romaniuk, Ehrenberg-Bass Institute

Understand the importance of branding and **long-term** strategy.

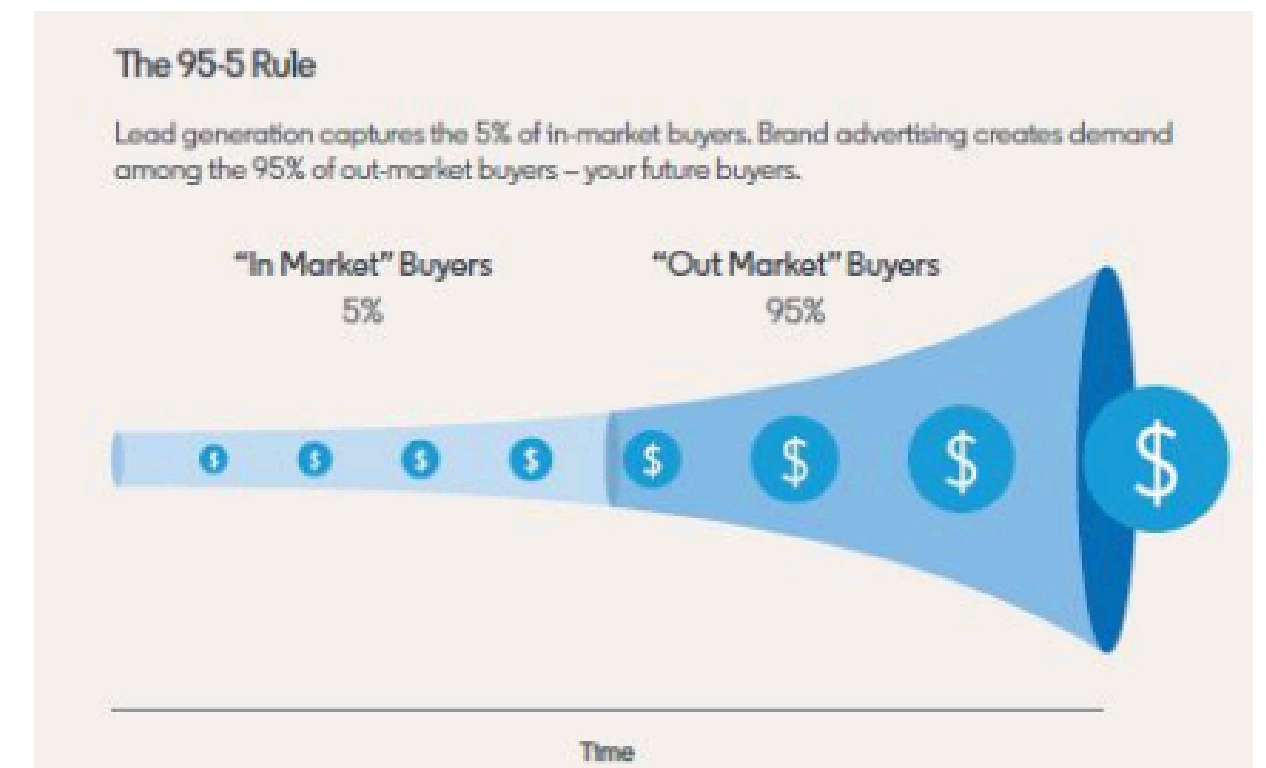
If marketing only cares about BOF leads, they will have a very empty pipeline down the road.

Invest in branding where it builds legacy and makes your business “**top-of-mind.**”

Understanding “In-Market” for B2B Marketing

B2B LinkedIn Data 95v5 rule.

Be there before they need you. Mind share leads to market share.



Touchpoints

LinkedIn

LinkedIn shared data that supported the claim that customers need to interact or consume content **13** times before **CONTACTING** the vendor.

Touchpoints Drive Impact



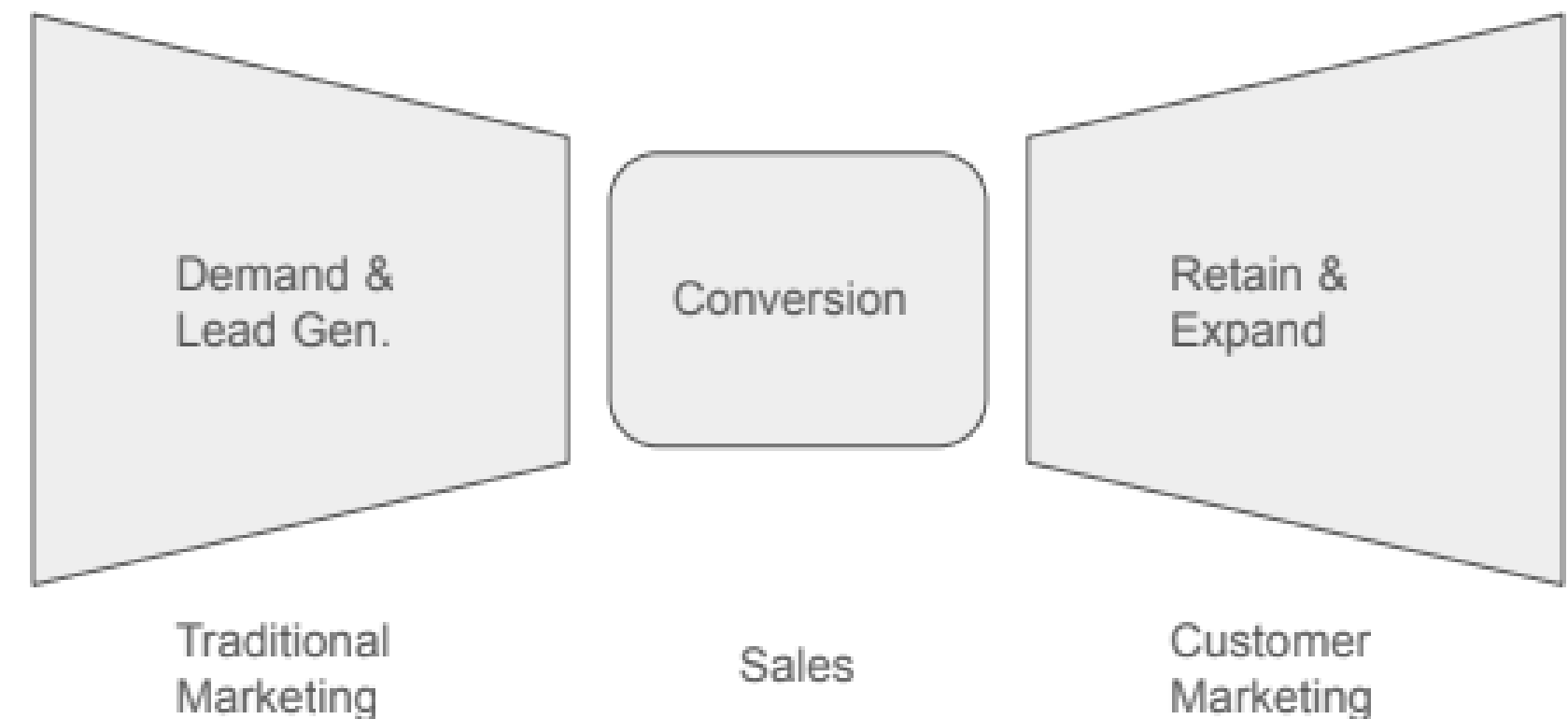


Touchpoints

Marketing in the AI world has to focus on **relationships**.

This opens the door for customer marketing, expanding the funnel past “TOF, MOF, & BOF” into the **sales cycle + client journey**.

Jacco Van Der Kooij Bow Tie Model





Influence

Decide what you believe, or you will be **told** what to believe.

Always **suggest** products,

Prioritize **authenticity**,

Behave in a **relevant** way,

Remember people's **names**...

and understand that people often don't really know what **they**
think, until you **tell them** what to think.



Don't Get Lost

“Remember to tell yourself the truth.”



Noah Cisneros | Adaptable Growth Marketing

THANK YOU

Email: noah@noahcisneros.com • Phone: (385) 261- 9296 •
LinkedIn: [linkedin.com/in/noahmcisneros](https://www.linkedin.com/in/noahmcisneros) • Website: noahcisneros.com

