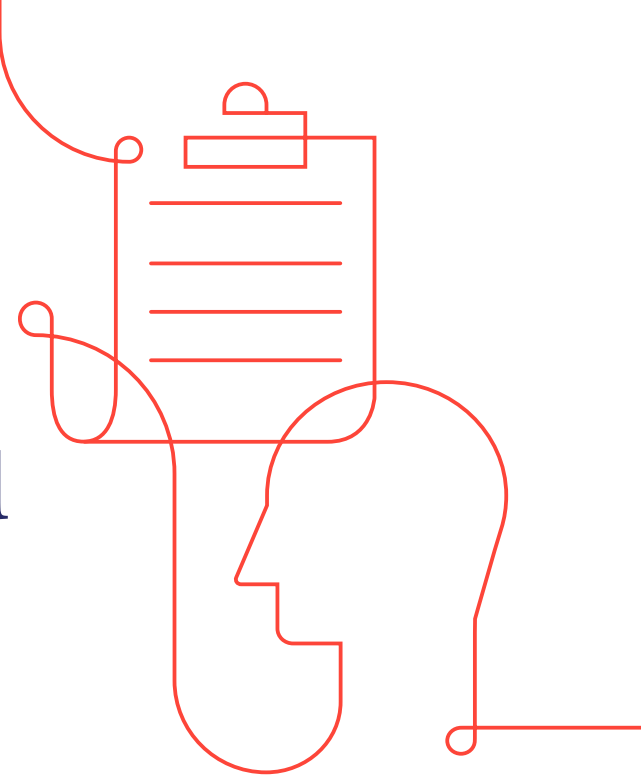**Halmyre Thinking:**

Canadian Finance & Leasing Association

Using Persona-Based Marketing to Engage Younger Members

The Canadian Finance & Leasing Association (CFLA) advocates for the asset-based financing, vehicle and equipment leasing industry in Canada. The CFLA has more than 220 members across Canada, ranging from large multinationals to smaller regional domestic companies spanning the financial services spectrum.

THE CHALLENGE

A 2019 member research study commissioned by the CFLA found that it needed to work on recruiting the next generation of talent for the industry.

Halmyre identified that the following CFLA business objectives must help focus return on investment (ROI) for their marketing efforts:

- Grow membership across Canada
- Expand through a high volume of targeted small-business members using the association's self-serve functions

- Engage early-career professionals to build the profession up, and establish that work as a major purpose of the association

Although the CFLA has a basic segmentation model, it lacked a comprehensive understanding of its members' wants and needs. The CFLA partnered with Halmyre to establish a member-focused approach to its marketing and upcoming website rebuild.

"We came out of our work with Halmyre with a much better understanding of who our membership base is, and how to tailor our services and brand to better engage them."
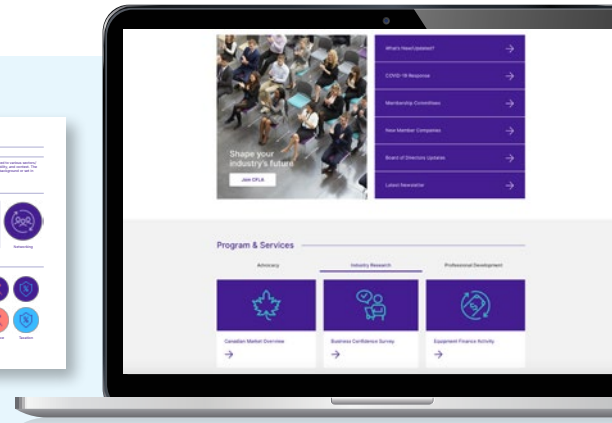
Michael Rothe, President & CEO, CFLA

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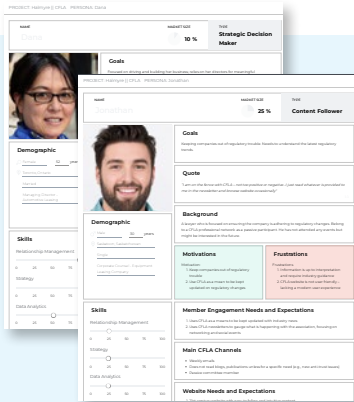
halmyre.com

CFLA Persona Structure
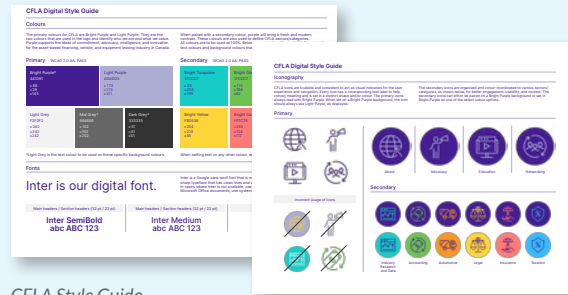
CFLA Style Guide

CFLA Website

THE SOLUTION

To improve the CFLA's member engagement, Halmyre created a customer experience evaluation and persona development package by

- Creating five detailed personas to inform the CFLA's membership work
- Unifying member engagement for all aspects of the CFLA's marketing – new website, content generation, access levels, structure of events, communication approach and education opportunities
- Improving website design and user experience, social media use and networking events

The interviews conducted to create the personas helped to identify the kinds of members the CFLA should prioritize when optimizing the member experience and managing ROI.

GOALS

The following were key success factors for this project:

- Gain insight into the CFLA's audience as embodied by codified personas representing members' wants, needs and motivations
- Understand how to address the next generation working in the finance and leasing industry

- Update the CFLA's website to better target and engage members

Key performance indicators included increasing:

- Website engagement
- Number of young CFLA members
- Data intelligence for the organization

PROCESS

In partnership with the CFLA, Halmyre's integrated marketing strategy team carried out the following work:

- Conducted one-on-one interviews with 10 CFLA members to identify key patterns, leading to creation of the member personas
- Restructured the CFLA website and wrote new copy directed toward targeted personas
- Outlined the business requirements for a customer/association relationship management (CRM/AMS) system and used a scoring matrix to choose appropriate software
- Monitored the CFLA's social posting on Halmyre's social media planning and data tool, and provided detailed recommendations for increased engagement
- Implemented a persona-led marketing approach

Results:

CFLA now has an empowered team that can create and release new content elements to keep the website fresh, and promote to reach the widest provincial population. Other results:

A persona-led increase in marketing capacity

Board buy-in on the business case for future investments in member engagement

A new focus on holistic AMS functionality rather than a simple CRM system

A revitalized foundational website for long-term digital engagement

143%

increase in social media engagement using new insights and productivity tools

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