

Plan On a Page: EMEA Financial Services Go-to-Market

Executive Sponsor: Patricia O'Connor, Regional VP EMEA

Project Lead: Hans Mueller, EMEA Industry Marketing Lead

Project Manager: Sophie Laurent

Vendor / Agency Details: Wunderman Thompson (creative), Mindshare (media), Interprefy (translation)

Internal Creative Team(s): EMEA Marketing Studio (London-based)

D/I/N:

- **Decide:** Patricia O'Connor, Hans Mueller, EMEA Sales Leadership
- **Input:** Global Product Marketing, Legal/Compliance, Industry Solutions Team, Country Sales Managers
- **Notify:** Global Marketing, Partner Marketing, Field Sales Teams, Customer Success

G/R/L

Geography	Lead Name	Notes (Adopt/Adapt/Invent)
Global:	N/A	Not applicable - this is a Regional initiative. Global team provides product messaging framework and compliance guidelines but does not create campaign assets.
Regional:	Hans Mueller (EMEA Lead)	Invents full EMEA Financial Services campaign from ground up. EMEA creates all assets tailored to European financial services regulations (MiFID II, PSD2), creates industry-specific messaging, produces customer case studies with European banks, and develops compliance-first positioning. Campaign addresses unique EMEA needs: Brexit impact, ECB digital euro, and fragmented market structure.
Local:	Julia Schmidt (DACH), Pierre Dubois (France), Marco Bianchi (Italy), Emma Wilson (UK&I), Anna Kowalski (CEE)	Adapt - Local teams translate and culturally adapt regional campaign. DACH emphasizes engineering excellence and security certifications. France highlights data sovereignty and local hosting. UK focuses on post-Brexit financial innovation. Italy adapts for relationship-based sales culture. CEE creates separate emerging markets messaging. Each market adds local compliance requirements and bank references.

Marketing objectives: Support EMEA H2 Revenue OKR: Generate €80M in Financial Services pipeline, achieve 35% win rate, close €28M in H2. Establish EMEA as reference region for Financial Services solutions globally.

Project description: Regional go-to-market campaign targeting financial services institutions across EMEA. Industry-specific campaign showcasing our platform's compliance, security, and scalability for banking, insurance, and fintech. Addresses unique EMEA regulatory requirements and market dynamics. Runs September-December 2024.

Audience: IT and Business decision-makers at Tier 1 & 2 banks, insurance companies, and fintech scale-ups across EMEA. Titles: CTO, CISO, Head of Digital Innovation, VP Technology. They care about: regulatory compliance, data residency, security, digital transformation ROI, and proven EMEA references.

Key messages:

1. Compliant by design: MiFID II, GDPR, PSD2, and DORA ready out-of-the-box
2. European data stays in Europe - 12 EMEA data centers, full sovereignty
3. Trusted by 50+ European financial institutions including [Top 3 Banks]
4. From legacy modernization to digital-first innovation - your trusted partner

Investment: €1.2M (creative production: €300K, media: €600K, events: €200K, local execution: €100K) + 12 FTEs across regional and local teams

Milestones | Key activities:

- August 1: Campaign strategy approved, creative brief finalized
- August 20: Customer reference interviews complete (6 case studies)
- September 1: Campaign creative production complete
- September 10: Local translations and adaptations ready (8 languages)
- September 15: Campaign launch - digital advertising begins
- September 25-26: Executive Roundtable (Frankfurt) - 50 FSI executives
- October 10: Webinar series begins (4 webinars, weekly)
- October 15-17: Money20/20 conference presence (Amsterdam)
- November 5: Case study hub launches (digital experience)
- November 20: White paper release: "Future of European Banking 2025"
- December 10: Campaign closes, pipeline review
- December 20: ROI analysis and learnings documentation

Risks / Blockers:

- Regulatory changes (EU Digital Operational Resilience Act timing uncertain) - mitigation: modular messaging, quick update capability
- Customer reference availability (banking marketing approval cycles slow) - mitigation: started reference program 3 months early
- Budget pressures in target accounts due to economic uncertainty - mitigation: emphasize cost savings, efficiency gains
- Language/cultural nuances across 20+ markets - mitigation: native speaker review for all materials
- Sales team capacity to follow up on leads - mitigation: BDR team expansion, lead scoring prioritization

Activation Components:

- **Digital Advertising:** LinkedIn, programmatic display on FSI media (€400K spend, 8 markets)
- **Executive Roundtables:** 3 invite-only events in Frankfurt, London, Paris (150 total attendees)

- **Industry Events:** Money20/20, Sibos, Paris Fintech Forum (speaking slots + booths)
- **Content Marketing:** Industry white paper, 6 customer case studies, blog series (12 posts)
- **Webinar Series:** 4-part "Banking Innovation" series in English, German, French
- **Email Campaigns:** Account-based campaigns to 500 target accounts (3-touch sequence)
- **PR & Analyst Relations:** Bylined articles in The Banker, Finextra; briefings with Gartner, Forrester
- **Social Media:** LinkedIn thought leadership, customer success stories, event coverage
- **Direct Mail:** Premium gift package to Top 100 prospects (compliance books + demo access)
- **Referral Program:** Incentivize existing FSI customers to refer peer institutions

KPIs, Anticipated Impact & Measurement:

- **Pipeline Generation:** €80M in qualified pipeline (target account deal size: €500K-2M)
- **Win Rate:** 35% win rate on FSI opportunities (EMEA average: 28%)
- **Revenue:** €28M closed/won in H2 (tracked in Salesforce)
- **Account Penetration:** Expand into 40 new FSI accounts (currently at 110 accounts)
- **Marketing Qualified Leads:** 800 MQLs from FSI targets (scored for industry fit + intent)
- **Event Impact:** 200 executive engagements at roundtables and conferences
- **Content Engagement:** 5,000 white paper downloads, 2,000 webinar attendees
- **Brand Awareness:** 30% aided brand awareness in EMEA FSI segment (survey)
- **Customer Advocacy:** 15 new customer reference stories (video, written)
- **Deal Velocity:** Average 120-day sales cycle (down from 150 days)
- **Media Coverage:** 25 earned media placements in FSI trade publications
- **ROI:** 15:1 marketing ROI (pipeline influenced / campaign spend)