

Community Bank's Annual Report Former Bankers Tell the Story to Customers and Stakeholders

Case Study

A Massachusetts bank with a 175-year history of service to customers and community turned to us – as former bankers – to tell their story in clear and concise prose for content for their many customers, stakeholders, and friends.



The Project

A Massachusetts-based bank determined that its annual report had to do a better job of explaining the bank's mission, its approach to serving its retail and commercial customers, and its performance as a philanthropic bellwether throughout the 30 communities that the bank serves. The writers of previous reports, while talented, did not understand banks and banking. The bank turned to us – as former bankers – to develop and write the text for the annual report.

The Process

We began the project by reviewing the bank's 175-year history, current strategic plan, product and service offerings, and recent operating performance by business line. We then developed a series of questions and conducted interviews with senior bank officers, department heads, and customer-facing members of the professional banking team and the bank's associated charitable foundation.

After compiling our findings and assessing how each area of the bank and foundation had served its constituencies during the previous twelve months, we distilled the findings into an outline of salient message points and presented them to the bank's executive management group.

Our Services

Graber Associates offers a full slate of services and programs that help you reach your important constituencies:

Public Relations

- Message development
- Press and analyst relations
- News release programs
- Editorial placements
- Media and analyst briefings
- Client/Partner newsletter
- Company backgrounders

Marketing

- Messaging and positioning
- Trade show planning & support
- Announcement plans and strategy
- Press and analyst tours
- White papers
- Sales guides and slip sheets
- Speakers' bureau services and speechwriting
- Customer/partner newsletters

Research

- Customer satisfaction surveys
- Cash management analysis
- Market research
- Bank or vendor RFP's
- Marketing plans
- Implementation plans
- Marketplace analysis
- New market perspectives
- Competitive assessments

Taking recommendations on points of emphasis desired by the senior executives, we wrote the report text. We also collaborated with the design firm in the placement and captioning of the report's photos. Text and captions underwent minimal editing and revisions. The final step in the project was review of the President's Letter.

The Result

The bank's 12-page annual report was delivered earlier than previous years' reports and within budget.

It succinctly conveyed the bank's desired messages about commitment to customers and community while telling the story of the year just past and plans for the year ahead.

About Graber Associates LLC

Graber Associates is a boutique public relations, marketing, and research firm founded in 2002. We develop and implement public relations and marketing communications programs that generate revenue for businesses. We provide research that allows our clients to make better decisions. Although we specialize in financial services and technology, our services cover a wide range of vertical markets.

We work hand-in-glove with you to develop public relations initiatives and execute marketing campaigns that are created with years of experience behind them. Your goals, objectives, and budget are integral parts of our working with you. As part of your team, we begin to think as you do and suggest ways to improve the process and achieve collective goals.

For More Information

Graber Associates LLC	info@graberassociates.net
27 Maryvale Road	www.graberassociates.net
Burlington	+1 (781) 221 0018
Massachusetts 01803	+1 (781) 658 2474