Sales Transformation

Lessons learned from 6 months above goal with a Gen Z Sales Team

Equipping the Gen Z sales team

Late Millennials and Gen Z represent the largest paradigm change for employers since the baby boom

Gen Z sales reps have different ideas of what to sell

We can’t force them into our models and expect them to be successful

We must create products that bridge the divide

Leveraging our assets and people

They want a connection with their coworkers back in the office

Imagine you were born in the year 2000

- You have no memory of 9-11
- You were 4 when Facebook came out
- You were 7 when the iPhone launched
- Most Gen Z received their first smartphone between 8-13 years old
- They now spend 6+ hours daily on smartphones
- You likely lost a year of High School or College to Covid

Gen Z Trivia

What is this company?

SHEIN

US Sales of $14 Billion in 2024
30% of Gen Z have shopped here in 2024

Who is this?

Alex Earle
7.5 Million followers on TikTok
$450,000 per post

What brand is this?

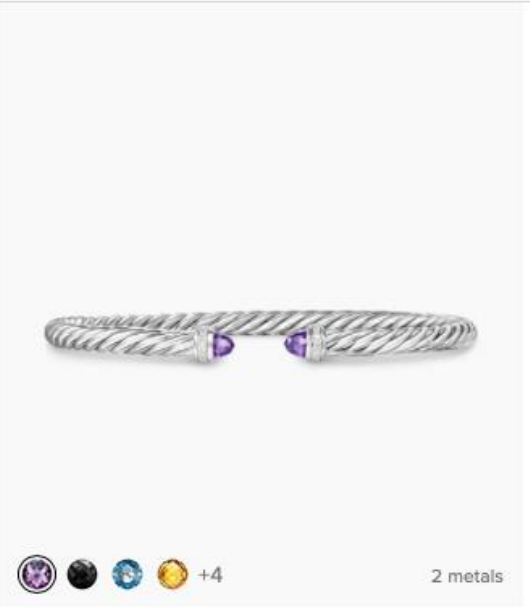
DAVID YURMAN

NEW IN | WOMEN'S | MEN'S | GIFTS | COLLECTIONS | WEDDING | HIGH JEWELRY

Cable Flex Bracelet 4mm
$475 - $525
Sterling Silver with 14K Yellow Gold

Classic Cable Bracelet 4mm
$395 - $410
Sterling Silver with 18K Yellow Gold

Classic Cable Bracelet 4mm
$495 - $545
Sterling Silver with 18K Yellow Gold



Cable Flex Bracelet 4mm
$495 - $575
Sterling Silver with Diamonds

Some Slang for You

- **Obsessed:**
- **OOTD:**
- **GRWM:**
- **Slay:**
- **Glow Up:**
- **Vibe:**
- **Slaps**
- **Delulu:**

Creating product to sell

- Leverage your Gen Z sales team
- Give them the chance to be creative
- Content can come from anywhere
- Give it time to grow and develop then monetize
- Your customers want UGC

Social Media Tailgate for LSU Victory Celebration

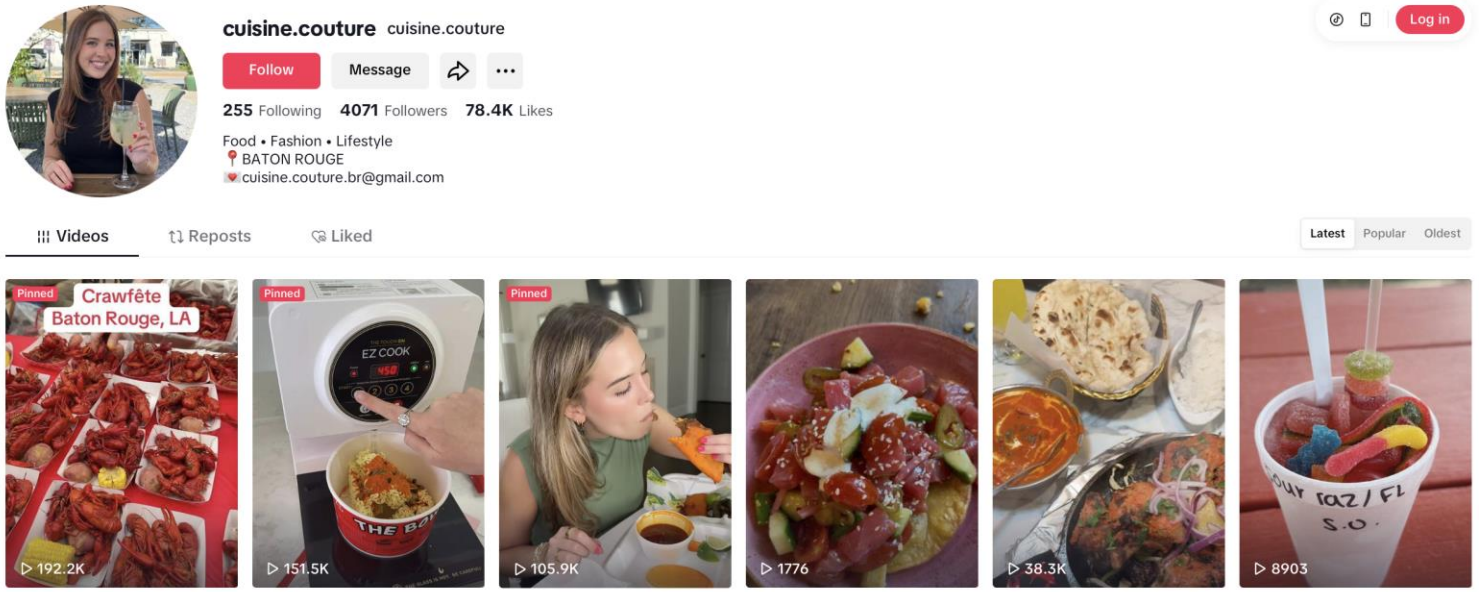
THE ADVOCATE | The Times-Picayune | nola.com | THE ACADIANA ADVOCATE | THE SHREVEPORT-BOSSIER ADVOCATE

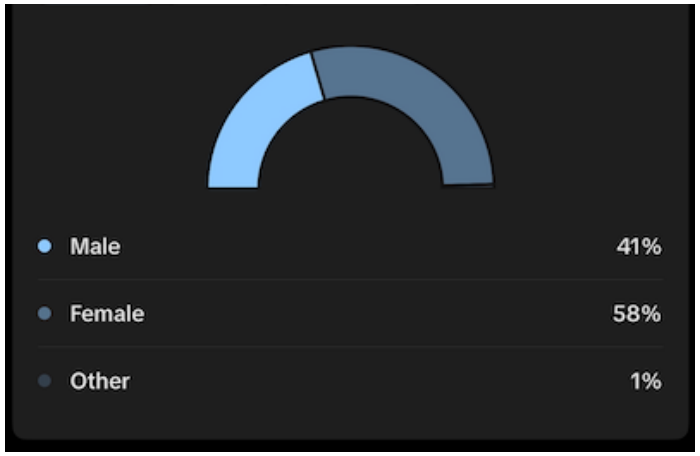
premium solutions for connecting target audiences

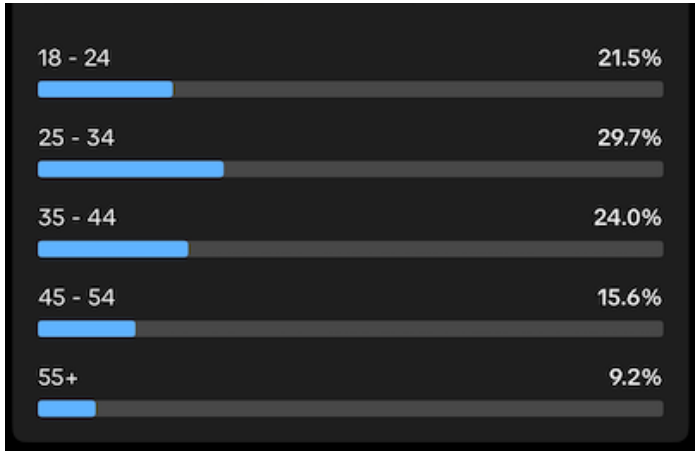
THE ADVOCATE | The Times-Picayune | nola.com | THE ACADIANA ADVOCATE

Showcase Your Business with Premium Content

Cuisine.Couture with Kelsey Higdon







Key Dates:
Victory Tailgate 3 videos filmed for LSU Victory Celebration

- Verbal mention and Title Card in all videos
- Logo onscreen throughout

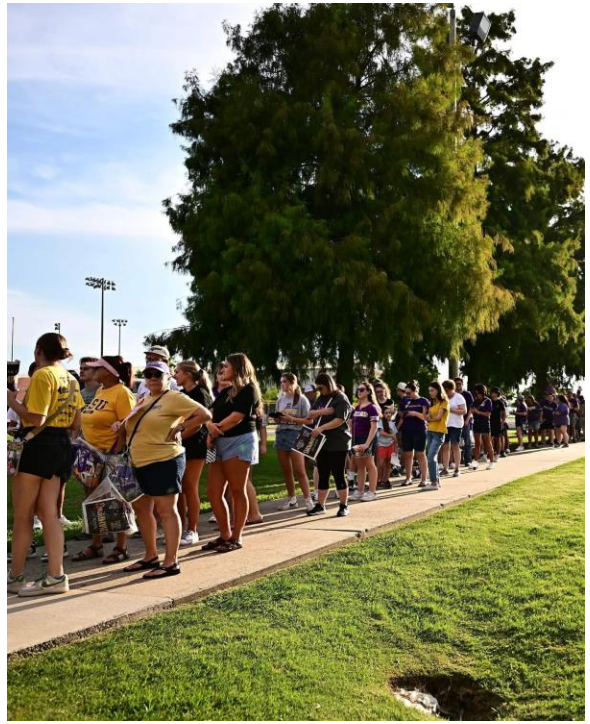
- Fan Poster Handed out from the tailgate (5,000 copies)
- Fan poster included in the Wednesday print editions all markets

Distribution Plan

- Clips shared on Cuisine.couture and NOLA.com TikToks and Instagram
- $1000 boost budget across platforms
  - Investment $5500

Huge Success

- Over 250,000 views on TikTok
- Traditional assets delivered via onsite activation

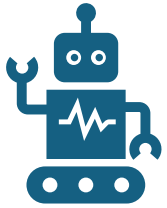


Training for success – The Phone

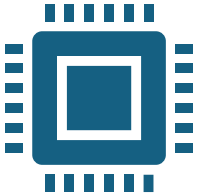
- Gen Z has lived a more text-based communication lifestyle
  - 32% of Gen Z rarely make a phone call
  - 20% find it weird when they receive one
  - 36% admit they would only make a call to locate their friends on a night out
  - 19% would only make a voice call in an emergency
- We must teach and roleplay phone calling
  - This includes drilling call roleplays over and over
  - Providing scripts and examples
  - Don’t isolate them to make calls
- With time and training the phone can become a powerful tool
  - You must do organized call blocks

Lean into AI

Gen Z is AI fluent, don’t fight it, leverage it



“No One will lose their job to AI, People will lose their job to people using AI”



Experiment with the models

ChatGPT has an easy API plug in

Gemini is for my money the most advanced currently

Automate simple tasks

- Geo Fencing lists

Can you please organize this into a matrix with column headers: Location name, street address, City, State, zip.

Item 1 of 3

- SULLIVAN'S STEAKHOUSE
- 5.3 miles away
- 5252 Corporate Blvd, Baton Rouge, LA 70808, USA
- Restaurant Week Menu
- SOLERA
- 5.6 miles away
- 4205 Perkins Rd, Baton Rouge, LA 70808, USA
- Restaurant Week Menu
- Item 1 of 2
- BURGERSMITH ON PERKINS
- 6.1 miles away
- 3613 Perkins Rd, Baton Rouge, LA 70808, USA

Location name	street address	City	State	zip
SULLIVAN'S STEAKHOUSE	5252 Corporate Blvd	Baton Rouge	LA	70808
SOLERA	4205 Perkins Rd	Baton Rouge	LA	70808
BURGERSMITH ON PERKINS	3613 Perkins Rd	Baton Rouge	LA	70808
SOJI	5050 Government St	Baton Rouge	LA	70806
FRANKIE'S DAWG HOUSE	2318 Cedardale Ave	Baton Rouge	LA	70808
MIKE ANDERSON'S	1031 W Lee Dr	Baton Rouge	LA	70820
BRASSERIE BYRONZ	515 Mouton St	Baton Rouge	LA	70806
ROCCA PIZZERIA	3897 Government St	Baton Rouge	LA	70806
MODESTO TACOS TEQUILA WHISKEY	3930 Burbank Dr	Baton Rouge	LA	70808
THE GREGORY	150 3rd St	Baton Rouge	LA	70801
STROUBE'S SEAFOOD AND STEAKS	107 3rd St	Baton Rouge	LA	70801
CAPITAL CITY GRILL	100 Lafayette St	Baton Rouge	LA	70801
CECELIA CREOLE BISTRO	421 N 3rd St	Baton Rouge	LA	70802
1717 KITCHEN + COCKTAILS	1717 River Park Blvd	Baton Rouge	LA	70802
LIBRARY WINE & PROVISIONS	7530 S Burnside Ave	Gonzales	LA	70737
THE GRAPEVINE CAFE	211 Railroad Ave	Donaldsonville	LA	70346
PROUD MARY'S SPEAKEASY	5725 Commerce St	St Francisville	LA	70775
RESTAURANT 1796	7747 US-61	St Francisville	LA	70775

Help with Emails

- You are a sales rep for Georges media the parent company of NOLA.com, The Advocate, and the Times-Picayune, and we are a full-service digital agency with hundreds of customers across Louisiana Write a sales email to INPUT1 at INPUT2. you are trying to get an in-person appointment with the customer at their office (don't mention a cup of coffee). The subject line should be positive no more than 10 words, attention-grabbing, and avoid sales words like buy. Please include this Key insight INPUT3. Keep it positive. Focus on our track record of success driving ROI in their industry in a measurable and trackable ways. The tone should be conversational and at no more than a 10th grade level total length should be no more than two paragraphs. Your name is {Sales Rep Name}

Help with Ad Ideas

- Provide 3 options for an online display ad each should have a short headline, a generic stock image suggestion, a call-to-action button (do not include sale or discount messaging unless I specify it and keep it short), and a web-safe font for online display banner ads appropriate for a 300x250 ad. The name of the business is INPUT1, the goal of the ad is to INPUT2 . The ad should be targeted to INPUT3. Please use positive language, at no more than an 8th grade level. The brands colors are INPUT4 so please include that information in your response. Here are any specifics on the promotion or offer that you should consider: INPUT5

Result

Here are three options for your online display ad: ###

Option 1: **Headline:** "Your Dream Home, SOLD Fast!" **Stock Image Suggestion:** A background image of the Pelican Lakes house with subtle fireworks in the sky. **Call-to-Action Button:** "See More Success" **Web-Safe Font:** Verdana **Design Tip:** Incorporate red, white, and blue as the main color scheme. The headline text can be in red, with the call-to-action button in blue, and white text for contrast. ---

Option 2: **Headline:** "Happy 4th & Happy Homes!" **Stock Image Suggestion:** A sold sign with fireworks over Pelican Lakes house. **Call-to-Action Button:** "List Yours Today" **Web-Safe Font:** Arial **Design Tip:** Focus on a vibrant mix of red and blue for the text against a white background, making the ad festive and easy to read. ---

Option 3: **Headline:** "Sold in a Snap, Celebrate with Us!" **Stock Image Suggestion:** A celebratory firework display over the Pelican Lakes property. **Call-to-Action Button:** "Join Our Success" **Web-Safe Font:** Georgia **Design Tip:** Utilize a patriotic red border, white text, and a call-to-action in a bold blue to align with the celebratory 4th of July theme.

Gemini Deep Research

- I work for a marketing agency and I have a credit union customer who is seeing lower loan volume I would like a report on the overall state of auto, mortgage, and heloc loans in the market can you do some research and help me understand if there are larger market forces impacting the number of loans my customer getting applications for

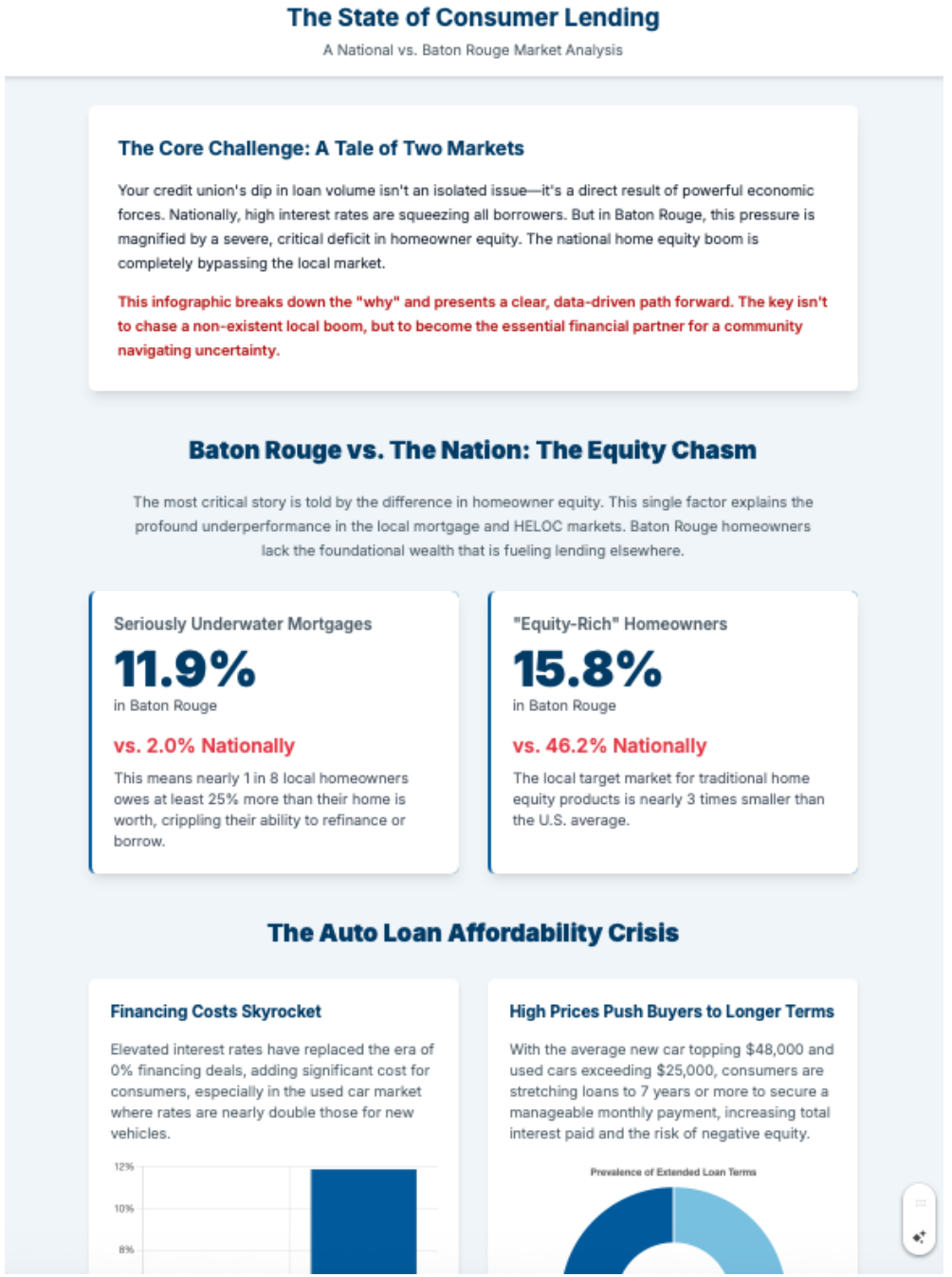
The Strategy results

- **VII. Synthesis and Strategic Recommendations**
- The preceding analysis demonstrates that the decline in loan volume at the Baton Rouge credit union is not a simple problem with a simple solution. It is the result of a complex interplay between national monetary policy, consumer financial strain, and a uniquely challenging local economic and housing environment. To effectively advise the credit union, it is essential to synthesize these disparate threads into a clear, cohesive narrative and translate that narrative into specific, actionable strategies.
- **Connecting the Dots: A Clear Narrative for Your Client**
- A clear understanding of the "why" behind the numbers is crucial for developing an effective marketing response.
- **Why are Auto Loans down?** The auto loan market is caught in a perfect storm of unaffordability. Nationally, vehicle prices remain historically high, and elevated interest rates have made financing more expensive than it has been in years. For the typical consumer in Baton Rouge, this national pressure is compounded by the realities of a weak local job market, which provides neither the income growth nor the financial confidence needed to commit to a large new loan. The strain is already evident in the data, with Louisiana exhibiting a higher-than-average auto loan delinquency rate, signaling that many households are already struggling with their existing vehicle payments.
- **Why are Mortgage Loans down?** The primary deterrent in the mortgage market is the national interest rate environment. With average 30-year fixed rates hovering near 7%, a massive affordability hurdle has been erected, sidelining many potential buyers. Simultaneously, the "lock-in effect" keeps existing homeowners with low-rate mortgages from listing their properties, constraining supply. While the Baton Rouge housing market is showing signs of shifting to favor buyers—with more inventory available and homes taking longer to sell—this has not been enough to overcome the dampening effect of the stagnant local economy. Fewer residents feel financially secure enough to make the largest and most significant purchase of their lives in this environment.
- **Why are HELOCs down?** This diagnosis is the most straightforward and the most critical. The national boom in home equity lending is being fueled by a historic accumulation of homeowner wealth across the country.
- **That boom is completely bypassing Baton Rouge.** With an alarming 11.9% of local mortgages seriously underwater and only a tiny 15.8% of homeowners considered "equity-rich," the pool of eligible and willing borrowers for traditional HELOC products is exceptionally small. The credit union is not losing a race for market share; in many ways, for this specific product, there is no race to be run in Baton Rouge.

The Strategy results

- **Actionable Marketing and Product Strategies**
- A strategy built on national trends will fail in the Baton Rouge market. The following recommendations are tailored to the specific challenges and opportunities identified in the local data.
- **For Auto Loans: Focus on Affordability Solutions and Refinancing**
- **Strategy:** The core marketing message must shift from encouraging new purchases to providing relief from existing financial burdens. The focus should be on "Lower your current car payment," not "Buy a new car."
- **Tactics:**
    - Launch a highly visible "Refinance and Save" campaign. This initiative should specifically target individuals in the Baton Rouge area who have auto loans with other lenders (banks, captive finance companies), highlighting the potential for significant monthly savings by refinancing with the credit union.
    - Develop and market a "Credit Builder" auto loan product. This loan should be designed for the near-prime segment, positioning the credit union as a partner in improving members' financial health, not just a source of funds.
    - Create educational content (blog posts, social media infographics, short videos) that clearly explains the long-term financial dangers of 84-month loans. By promoting the total-cost savings of shorter terms, the credit union can reinforce its role as a trusted advisor.
- **For Mortgage Loans: Champion the First-Time Homebuyer**
- **Strategy:** Given the lock-in effect on existing homeowners, the greatest opportunity for growth in the purchase mortgage market lies withfirst-time homebuyers (FTHBs). The credit union should aim to own this space, leveraging the local market's shift to favor buyers.
- **Tactics:**
    - Host FTHB seminars, both virtually and in-person. The content must be tailored to the Baton Rouge market, with session titles like "How to Navigate a Buyer's Market in Baton Rouge" or "Making an Offer When You Have Options."
    - Aggressively market government-backed loan programs, such as FHA and VA loans. These products often feature lower down payment requirements, making them highly appealing to the cash-strapped FTHBs who are the most likely buyers in the current environment.
    - Develop marketing content that empowers buyers. Highlight the negotiating power that comes with rising inventory and longer days on market, and position the credit union's loan officers as expert guides who can help members capitalize on these conditions.
- **For Home Equity: Pivot from "Tapping Equity" to "Building and Using What You Have"**
- **Strategy:** The marketing of home equity products requires a complete overhaul. The credit union must acknowledge the local equity deficit and reframe its product offerings to meet the actual needs of the community.
- **Tactics:**
    - De-emphasize marketing for large, aspirational, variable-rate HELOCs. Instead, promote smaller, fixed-rate home equity *loans* for specific, value-adding purposes. This includes critical home repairs or strategic kitchen and bathroom remodels that can help homeowners build the equity they currently lack.
    - Create and heavily promote a "Debt Consolidation Loan" package. This product would use a small home equity loan as a tool to pay off high-interest credit card debt. The marketing message must be centered on improving monthly cash flow and financial stability, not on funding discretionary spending.
    - For the very small segment of members who are genuinely equity-rich, abandon broad public advertising. Instead, utilize targeted, direct marketing channels like personalized mail or email to reach this niche audience with tailored offers.

The Info Graphic Result



The State of Consumer Lending

A National vs. Baton Rouge Market Analysis

The Core Challenge: A Tale of Two Markets

Your credit union's dip in loan volume isn't an isolated issue—it's a direct result of powerful economic forces. Nationally, high interest rates are squeezing all borrowers. But in Baton Rouge, this pressure is magnified by a severe, critical deficit in homeowner equity. The national home equity boom is completely bypassing the local market.

This infographic breaks down the "why" and presents a clear, data-driven path forward. The key isn't to chase a non-existent local boom, but to become the essential financial partner for a community navigating uncertainty.

Baton Rouge vs. The Nation: The Equity Chasm

The most critical story is told by the difference in homeowner equity. This single factor explains the profound underperformance in the local mortgage and HELOC markets. Baton Rouge homeowners lack the foundational wealth that is fueling lending elsewhere.

Seriously Underwater Mortgages

11.9%

in Baton Rouge

vs. 2.0% Nationally

This means nearly 1 in 8 local homeowners owes at least 25% more than their home is worth, crippling their ability to refinance or borrow.

"Equity-Rich" Homeowners

15.8%

in Baton Rouge

vs. 46.2% Nationally

The local target market for traditional home equity products is nearly 3 times smaller than the U.S. average.

The Auto Loan Affordability Crisis

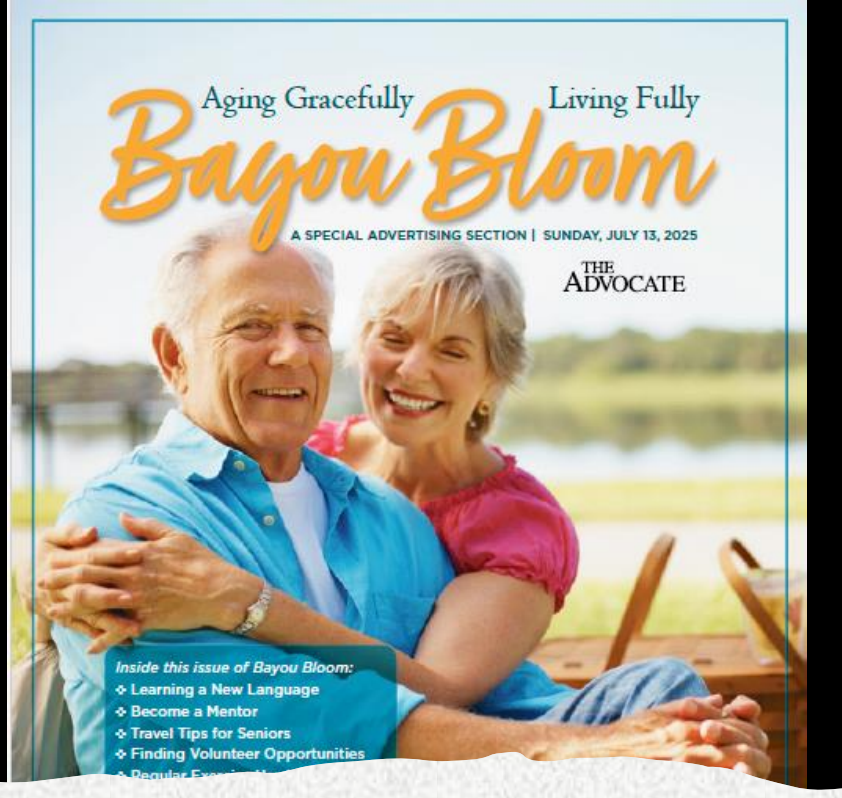
Financing Costs Skyrocket

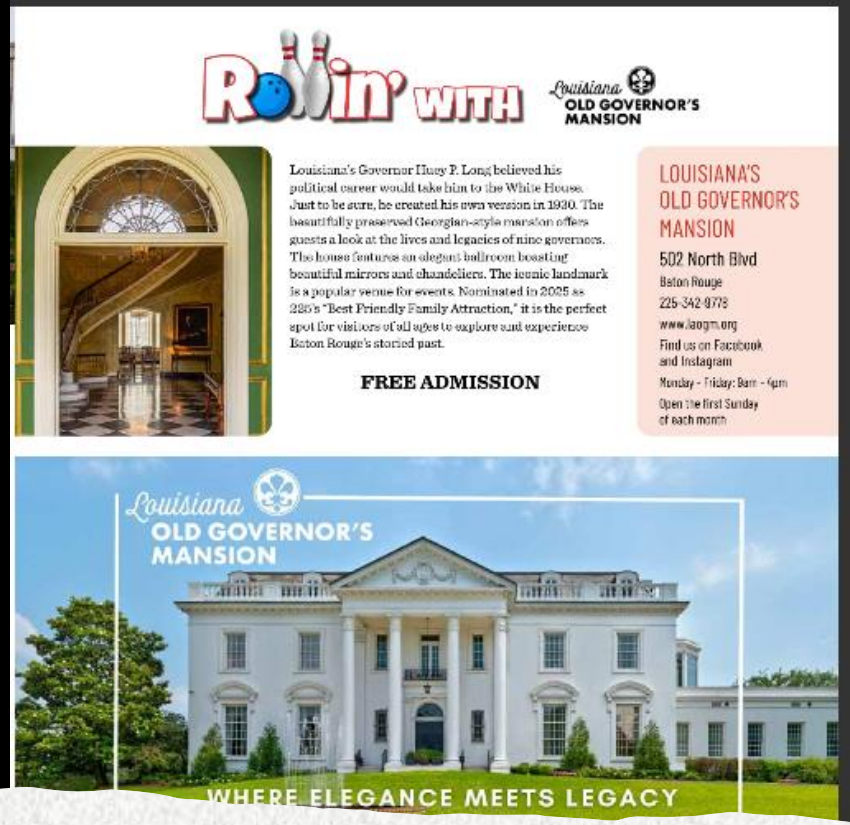
Elevated interest rates have replaced the era of 0% financing deals, adding significant cost for consumers, especially in the used car market where rates are nearly double those for new vehicles.

High Prices Push Buyers to Longer Terms

With the average new car topping $48,000 and used cars exceeding $25,000, consumers are stretching loans to 7 years or more to secure a manageable monthly payment, increasing total interest paid and the risk of negative equity.

Create social content





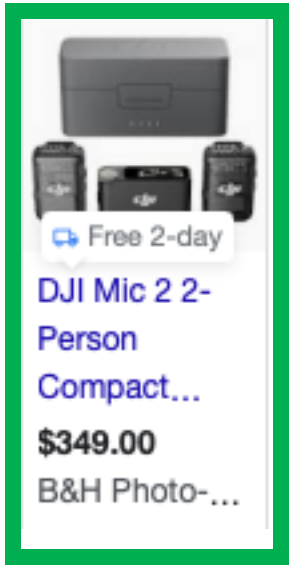
Continuing the Sponsored Content Journey

- Creating lower lift options
- Purchased content
  - Greenshoot media
- Templated Responses
- Partnership Sales

Continuing the Sponsored Content Journey

- Expanding in video
- Simple Support local videos
- Premium Client Webcasts
  - Webcasts are a premium offering with a premium price point

What do you need to make a quality video?



$184.88 ~~$234.88~~

$429.00

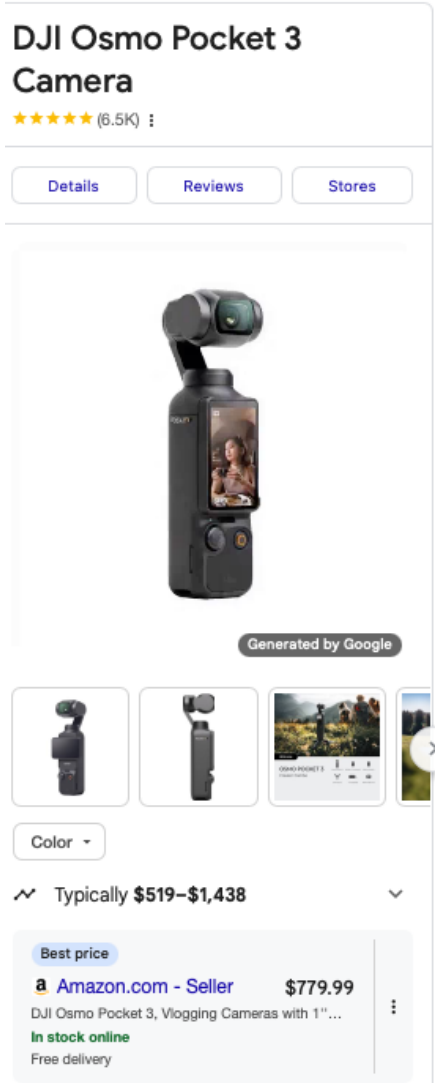
Camera

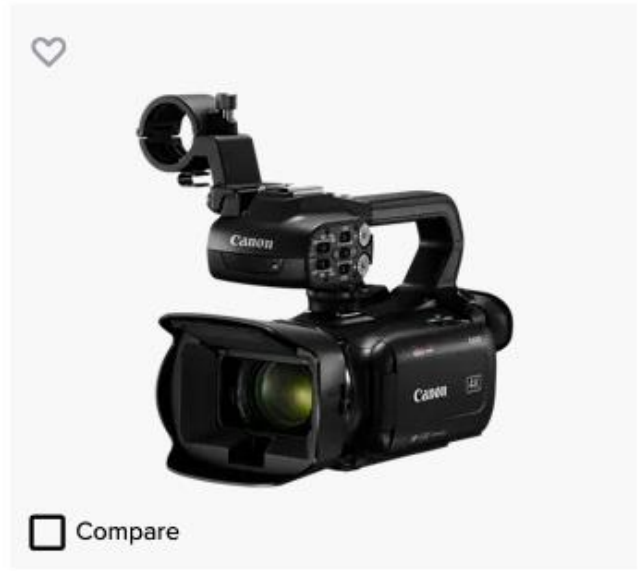
Discussion on Cameras

- Your iPhone is plenty sufficient
  - iPhone 12 or newer
- Customers may not find that satisfying however

Camera Options

- Budget DJI Osmo
- Mid-Range Cannon XA65
- Full Feature Sony FX





Discussion on Cameras

- Full Feature Sony FX – FX3 is Netflix approved
- Need a lens too

Cinema Line FX2 | Full-frame Cinema Camera with XLR Handle Unit

$3,099.99

Starting $108/mo or 0% APR

FX3A Cinema Line Full-frame Camera

$4,099.99

Starting $143/mo or 0% APR

Cinema Line FX30 Super 35 Camera

$1,749.99 ~~$1,949.99~~ Save $200.00

Starting $73/mo or 0% APR

Compare

FE 24-70 mm F2.8 GM Full-frame Standard Zoom G Master Lens

$1,599.99 ~~$1,799.99~~ Save $200.00

Starting $67/mo or 0% APR

Innovation doesn’t have to be expensive

Experimenting with lower-cost options can be just as successful