

PACB Virtual Marketing Conference

**Day I – May 24**

 **8:45a.m. Welcome & Login**

**9:00 a.m. KEYNOTE SESSION:**

**How to Market & Keep Selling in Tough Times: Without Being Tone Deaf or Insensitive to Serious Situations**

 **Kelly McDonald – McDonald Marketing**

 In a crisis or uncertain times, it’s more important than ever to connect with your customers and prospects, but in a meaningful way. But in current times, what it means to be meaningful is drastically different than what it was yesterday.  People still need products and services, but if your message or approach doesn’t reflect the reality of tough times, you risk appearing irrelevant – or worse, out of touch and insensitive.

Now, more than ever, it’s important to reach people in different ways to keep your business growing and stay top of mind through the turmoil.

It’s imperative that your customers and prospects know that you’re on top of tough situations and that you have their back.

Marketing and selling need to take on a different tone now, one that is about solving problems, not trying to simply move product out the door.

People spend money on what they care about.   And they don’t buy products, they buy solutions.  Show your customers and prospects how you fit into what they need and what they value right now, and they’ll show you the money.   By acknowledging people’s emotions, fears and anxieties and marketing with honesty and empathy, and by just tweaking your customer approach to reflect the times, you will get the business.

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In this Session you’ll learn:

* Five low-cost / no cost things you can do right now to grow your business with new customers and increase customer satisfaction and retention
* The do’s and don’ts of marketing during a crisis so you come out ahead when the storm passes
* How to use honesty and empathy in your marketing and sales approach, without coming across as emotionally reactive
* How to communicate in a relevant manner to build trust, foster long-term loyalty and stand out from your competition

**10:00**  **Experience Matters: How is Your Organization Crafting It?**

 **Robb Rempel - Haberfeld**

Competitors can copy your products and services. They can match your interest rates, marketing and locations. But they cannot match your people when they are executing on a well-focused and disciplined strategy. In our increasingly complex industry, your greatest return on investment comes from the

customer experience you create. During this session, you will assess what you are doing to drive consumers in the door and what your people are doing (or can be doing) to keep them. Ask yourself, “Are we delivering a transaction or creating an experience?”

**11:00 The Digital Dozen: 12 Key Strategies to Promote Your Bank Online**

 **Eric Cook - WSI**

When it comes to your bank's online success, there are a number factors that contribute to your success (or failure). Eric Cook, former community banker and now Digital Strategist with WSI is a two-time contributing author to the book "Digital Minds: 12 Things Every Business Owner Needs to Know About Digital Marketing" (now in its second edition). While you likely are not the individual updating your website or looking at site traffic reports at your bank, it is important that you have a high-level understanding of the key elements that make up an effective online presence - especially with today's consumer going to the web first when looking for information about your bank. As the "digitization of the consumer" shows no sign of slowing down, it's critically important to understand how to leverage an effective digital strategy to remain relevant.

**12:00 Lunch Break**

 **Take a Break from your screen and fuel up for a great afternoon!**

**12:45 p.m. The Shifting Landscape of Social Media**

 **Eric Cook - WSI**

Let’s face it, in today’s social media-driven world the only thing that seems to remain certain is that things change (all the time). You're likely already using some form of social media to engage and keep connected with your customers. But as the networks change and evolve, new features become available, rules change and customer preference shifts. Do you know if you’re getting the most out of your “social activities” now and that you’re getting optimal performance out of your efforts? This session is designed for the business professional to review the popular (and upcoming) social platforms and review what’s changed, what’s gone away so that you can keep on top of your “social game” and remain relevant to your audience.

**1:45 p.m. King of the Hill Mobile App Edition**

 **Dave DeFazio - StrategyCorps**

The secret to improving your future deposit growth lies in understanding the changing role of banking products in the financial lives of today’s consumers. In this session, we will dive into ongoing research the explains these trends – including which mobile features matter most to each generation, from millennials to baby boomers.

Learn about:

* How the growth of app-based payments and rewards are turning checking accounts into “paycheck motels.”
* How leading fintech apps are using your financial institution’s data to deliver new types of financial advice to your customers.
* How the trickle-down-effect of mobile banking is helping the biggest banks widen their lead against community banking institutions.
* What new mobile features from fintech checking accounts are expanding the definition of financial advice.
* How faster access to paychecks is evolving as a key banking feature in the gig economy.
* The newest tip-based pricing strategies for financial service products.

**2:45 p.m. Adjournment**



**Day II ▪ PACB Virtual Marketing Conference**

 **May 25, 2021**

**8:50 a.m. Login Open**

**9:00 a.m. Leveraging Technology to Drive Marketing Success**

 **Jon Martar ▪ Onovative**

Connecting with you customers has never been more important. With the challenges of the pandemic lingering on, marketing efforts over the last year have been anything but typical. How do bank marketers learn from the marketing challenges experience and what opportunities can be tapped into to be successful moving forward?

*Key points of this session include:*

* Using Data Management to unlock critical marketing growth opportunities
* Life Cycle Marketing by activating marketing tactics at every stage of the consumer journey
* Utilizing a multi-channel engagement approach
* Measuring marketing efforts to optimize processes and proof of value to justify marketing spend

**10:00 a.m. Key Strategies to Attract & Retain Customers**

 **Preston Afrank - Haberfeld**

People switch financial institutions for a variety of reasons, with up to 12% of households and businesses changing banking providers in any given year. Post COVID-19, this is reported to be as high as 22% of households and businesses. Client data shows the average life of a retail customer is approximately 10 years and generates approximately $3,247 in income over a lifetime of the relationship. Business customers have a similar life cycle and generate approximately 11,981 in the time period. From all of the scrambling some financial institutions do to find magic bullets, solid organic growth does not mean adding mor3e digital widgets or sales quotas. It means executing a series of proven behaviors to grow your customer base organically. It’s time for you to get more than your fair share!

**11:00 a.m. Delivering Your Story with Power and Clarity**

 **Patrick Dix - SHAZAM**

You have the opportunity to tell your institution’s story every day, yet unless you understand and consider the context, the filters through which others see the situation, and the unique experiences that different listeners bring to the conversation — opportunity is missed. Gain tips in how to really understand and engage in more permanent, meaningful outcomes.

**12:00 noon Adjournment**

**Meet Our Speakers**



**KEYNOTE**

**Kelly McDonald – McDonald Marketing**

[**www.mcdonaldmarketing.com**](http://www.mcdonaldmarketing.com)

**Award-Winning Speaker**

Kelly McDonald is a marketing and advertising specialist and considered one of the nation’s

top experts in consumer trends, generational differences and leveraging the customer

experience.  She is the founder of McDonald Marketing, which has twice been named one of

the “Top Ad Agencies in the U.S.” by Advertising Age magazine and ranked as one of the

fastest-growing independently-owned companies in the U.S. by Inc. Magazine.

She has been featured on CNBC, in Forbes Magazine, BusinessWeek, Fast Company, on

CNNMoney.com and on SiriusXM Radio. Her client experience includes iconic brands such

as Toyota, State Farm, Nike, Harley Davidson, Miller-Coors and Sherwin-Williams.

 In addition to her extensive public speaking experience, she is also the author of three

bestselling books:

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Her latest, "How to Work With & Lead People Not Like You", was #9 on the list

of [Bestselling Business Books of 2017](https://inthebooks.800ceoread.com/bestsellers/articles/800-ceo-read-s-2017-bestsellers). Her first, “How to Market to People Not Like You”,

was #7 on the list of [Bestselling Business Books of 2011.](http://inthebooks.800ceoread.com/8cr-bestsellers/articles/the-bestsellers-of-2011)  Her second book, “Crafting the

Customer Experience for People Not Like You”, was #5 on the list of

[Bestselling Business Books of 2013](http://inthebooks.800ceoread.com/news/articles/800-ceo-read-s-2013-bestsellers). Kelly’s third book is scheduled for release in June and is

predicted to be beyond a best seller – Let’s Talk About Race at Work will redefine how

businesses approach this vitally important topic.

Kelly is originally from Milwaukee, Wisconsin and graduated from the University of Wisconsin

– Madison.  She now lives in Denver, Colorado.  When she’s not speaking and traveling for

business, she enjoys hiking in the mountains and being outside.  And shopping for high heels.

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Senior Executive Vice President – Client Services

Haberfeld

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Robb Rempel, leads the profitability, research and marketing implementation teams at Haberfeld. With more than 20 years of experience in the financial services industry, Robb has worked with financial institutions of all sizes as both a Consultant and Account Executive. An experienced facilitator and presenter, Robb helps bank executives and their teams implement targeted strategies to drive ongoing growth and enhance overall profitability. Robb is a graduate of the University of Nebraska.



Eric Cook

Chief Digital Strategist

WSI Consulting

[www.ericcook.com](http://www.ericcook.com)

Eric Cook is an award-winning consultant with WSI (We Simplify the Internet), the world's largest provider of online and digital marketing solutions. Operating from his office in Battle Creek, Michigan, Cook serves clients across the nation in all areas of digital strategy. He is also a contributing author of the new book ***Digital Minds - 12 Things Every Business Needs to Know About Digital Marketing****.*

Eric began his consulting business after a successful 15-year long career as a community banker. Eric and his team specialize in helping businesses (especially community banks) in all areas of online strategy, including website development, search engine marketing, paid search marketing, social media, mobile marketing and overall strategic technology planning.

During his time as a banker, Eric was involved in virtually all aspects of the bank, starting on the teller line and also working in IT, marketing/sales, "C" level management and even serving the industry at the state level on several bank association committees. He maintains a passion for helping others in the industry learn and is a frequent speaker at state banking association meetings and related events across the country.



Dave DeFazio

Partner

StrategyCorps

[www.strategycorps.com](http://www.strategycorps.com)

Armed with a passion for banking strategy, StrategyCorps partner Dave DeFazio has found great success and satisfaction in exploring the intersection of data, marketing, and technology.

Dave’s extensive ﬁnancial services experience and continuous research in the ﬁeld help him ensure that each product and service meets the needs of today's ﬁnancial institutions. At StrategyCorps, he leads and manages the company’s direct sales eﬀorts while working directly with ﬁnancial institutions to design, build, and implement a variety of checking solutions.

He downloads banking apps for fun. On the weekend. And talks about them at dinner with his family. Across the industry, Dave is a highly sought-after speaker who has shared thought leadership on innovations in ﬁnancial technology, retail banking, mobile banking, customer engagement, product and customer proﬁtability, product design, bank marketing, and changing consumer behaviors in an increasingly mobile-centric world. Dave graduated from Ohio Wesleyan University with a B.A. in Economics and Mathematics.



Preston Afrank

Vice President

Haberfeld

[www.haberfeld.com](http://www.haberfeld.com)

Preston Afrank, Vice President, has more than 10 years of experience managing complex financial strategies. Prior to joining Haberfeld, Preston worked in the banking industry and served on a number of asset liability management committees. Preston uses his expertise and in-depth knowledge to help financial institution executives implement targeted strategies to grow core deposits, fee income and enhance overall profitability. Preston holds an MBA from the University of Nebraska.



Patrick Dix

Vice President of Strategic Alliances

SHAZAM

[www.shazam.net](http://www.shazam.net)

Patrick Dix is a seasoned media professional and the leader of SHAZAM’s strategic alliances efforts. In a 25-year career as a broadcast journalist, he received recognition for outstanding reporting with awards from The Society of Professional Journalists, The William Randolph Hearst Foundation and the Midwest Broadcast News Association.

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