PRACTICAL IDEAS + ACTIONABLE INSIGHTS

THE FINANCIAL BRAND FORUM is the largest conference in the world built specifically for senior-level financial marketing executives. Learn from the biggest names and brightest minds in banking, as they show you how to tackle your biggest challenges — three days jam-packed with the latest ideas, best practices and new innovations that are transforming financial marketing today.

divider

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forum2017.com
The Forum 2017 is hosted by The Financial Brand, one of the largest websites in the banking industry with over 1.5 million readers in 200+ countries around the world.

1,500 PROJECTED ATTENDEES

63% Attendees at the VP level or higher

16% Attendees with C-level titles

614 FINANCIAL INSTITUTIONS

$8.3 trillion in combined assets
$15 billion average asset size

65 WORLD-CLASS SPEAKERS

Attendees from 41 different countries
MAY 17
WEDNESDAY

7:30 am
REGISTRATION OPENS

9:00 am
MORNING WORKSHOPS
Strategic Planning Workshop
Digital Marketing Workshop
Growth and Profitability Workshop

12:00 pm
LUNCH PROVIDED

1:00 pm
AFTERNOON WORKSHOPS
Brand Strategy Workshop
Loan Growth Workshop
Onboarding and Cross-Selling Workshop
Branch Experience Design Workshop

4:00 pm
OPENING KEYNOTE
Ray Davis, CEO Umpqua Bank

5:00 pm
OPEN BAR RECEPTION

MAY 18
THURSDAY

7:30 am
BREAKFAST PROVIDED

8:30 am
FEATURED KEYNOTE
Eric Ryan, Co-Founder of Method

9:30 am
CONCURRENT BREAKOUTS

10:30 am
BREAK

11:00 am
CONCURRENT BREAKOUTS

12:00 pm
LUNCH PROVIDED

1:15 pm
7 IN 7
Seven institutions share seven ideas in seven minutes

2:15 pm
BREAK

2:45 pm
CONCURRENT BREAKOUTS

3:45 pm
FORUM X

5:00 pm
OPEN BAR RECEPTION

MAY 19
FRIDAY

7:30 am
REGISTRATION OPENS

8:00 am
BREAKFAST PROVIDED

9:00 am
FORUM UNIVERSITY
Dr. Jonah Berger, Wharton
Dr. Tina Seelig, Stanford

10:30 am
BREAK

11:00 am
CONCURRENT BREAKOUTS

12:00 pm
LUNCH PROVIDED

1:15 pm
CONCURRENT BREAKOUTS

2:15 pm
BREAK

2:45 pm
CONCURRENT BREAKOUTS

3:45 pm
FORUM X

5:00 pm
CONFERENCE CONCLUDES

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Ray Davis
CEO/President of Umpqua Bank

Ray Davis pioneered a customer-centric banking strategy and culture that has not only transformed his organization but challenged the entire industry as well. Davis reimagined the customer experience and delivery model, completely reinventing what a bank looks like and how it operates. Since 1994, when Davis took the reins, Umpqua Bank has grown from six branches and $140 million in assets to more than 330 locations with $24 billion in assets. Come hear how Davis turned Umpqua into one of the most universally admired brands in the banking world.

By fusing his passion for style and design with the strategic principles of brand building and corporate culture, Eric Ryan has created one of the world’s most admired and respected brands — Method, a scrappy, irreverent soap brand.

In this featured keynote, Ryan offers financial marketers essential lessons in how to disrupt any stodgy, undifferentiated category — even banking — by putting culture before process. Learn the secrets of differentiation in a highly commoditized, cutthroat industry where everyone says and sells the same things, and what you need to do to compete in a price-sensitive category dominated by a handful of giant, me-too brands.
Learn from two of the most respected and notable marketing professors on the planet at the Forum University.

Dr. Jonah Berger
Professor of Marketing at Wharton

Best-selling author and distinguished marketing professor Dr. Jonah Berger explores the forces that secretly control the choices we make every day. He blends business strategy, human psychology and social science to remove the cloak of invisibility from the external factors that influence people’s decisions, equipping you with practical tools to shape consumer choices and drive growth. This is a must-see presentation for anyone responsible for persuading others to take action.

Dr. Tina Seelig
Management Professor at Stanford

Dr. Tina Seelig is one of the world’s foremost authorities on the subjects of creativity and innovation, and has authored 17 books in the course of her career. In this keynote presentation, Dr. Seelig will teach you a set of tools that anyone can use to unlock their “Innovation Engine.” Demystify the creative process and learn the scientific methods that will allow you to unleash your true innovation potential and cultivate creativity across your organization.
FORUM X

Short, high-level strategic presentations from notable experts. It’s like TEDx for financial marketers.

Back to the Future: 1986 Revisited
Jim Marous, Co-Publisher of The Financial Brand

Jim Marous is a leading expert on retail banking, financial services innovation and consumer trends in the banking industry. As an author and co-publisher of The Financial Brand, Jim helps financial institutions understand the importance of digital transformation, the customer experience, marketing strategy, retail delivery and data analytics. Jim has been featured by CNBC, CNN, The Wall Street Journal, New York Times, The Financial Times, The Economist and Forbes. He has delivered keynote presentations to audiences around the globe, and has also advised the White House on banking policy.

Marketing to People Not Like You
Kelly McDonald, Marketing Expert and Best-Selling Author

Kelly McDonald is considered one of the nation’s top experts in multicultural marketing and consumer trends, helping brands such as Toyota, State Farm, Nike and Harley-Davidson target niche segments. She is the best-selling author of two books, and Advertising Age has twice named her company one of the top ad agencies in the U.S. Kelly will help you understand the importance of embracing diversity marketing, and why your institution must tailor both its products and messages in ways that acknowledge consumers’ socio-cultural differences.

Thriving in the Expression Economy
Ron Tite, Branding & Creativity Expert

Ron Tite is an award-winning advertising executive who has worked with many of the world’s most respected brands, including Microsoft, Kraft, Johnson & Johnson, Volvo, Hershey and Xerox. He is one of the most highly rated (and funny) speakers in the world on the subjects of creativity, innovation and corporate strategy. In his humorous and insightful speech, Ron will help financial marketers craft content that truly resonates in today’s Expression Economy.

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FORUM X

Short, high-level strategic presentations from notable experts. It’s like TEDx for financial marketers.

The Fifth Age of Banking
Don MacDonald, Chief Marketing Officer at MX

Don MacDonald has more than 25 years of experience in communications, product development and strategy for companies including Intel, Fiserv and Qualcomm. He spent two decades at Intel building the brand to be the 5th most valuable in the world. In 2008, MacDonald joined Fiserv as CMO, focusing on refining the organization’s brand and product strategies, delivering strategic and market insights to help financial institutions across North America.

Profit-Growth Essentials
Roxanne Emmerich, CEO of The Emmerich Group

Roxanne Emmerich is one of America’s most sought-after workplace transformation experts. As President and CEO of The Emmerich Group, Inc. she has worked with many of the financial industry’s biggest and most admired institutions, as well as clients including Merck, Pfizer, Allianz and Lockheed Martin. Roxanne’s book Thank God It’s Monday! was #1 on Amazon’s business bestseller list and was also listed as a best-seller by the Wall Street Journal. She has appeared on national media outlets like CNN, NPR and CBS for her talent helping businesses get unstuck and achieve radically improved results.

The Power of People
Brad Montgomery

Brad Montgomery teaches business leaders how to use their internal culture to boost productivity, creativity, innovation and profits. Brad has inspired and energized audiences in all 50 states and on four different continents, using humor, interactivity and multimedia to ignite a sense of passion and purpose. His clients include Microsoft, Verizon, the FBI, the CIA and the IRS. Brad will show you how to take your financial institution to a higher level by creating and sustaining positivity, optimism and meaningfulness across your team.
Network with the best and brightest in banking

Over 1,500+ of the brightest minds in banking from more than 600 of the most progressive financial institutions on earth will be at The Financial Brand Forum when it kicks off, making it the biggest event in the world for the industry’s senior-level marketing execs.

- One out of every four of the 1,000 biggest banks and credit unions in the U.S. will be at the Forum 2017.
- Over $8.3 trillion in combined assets represented.
- 80% of attendees work directly for a retail financial institution.

“Really dynamic. Very inspiring! Lots to take back to my team!”
— BRUNO JAUERNIG, VP MARKETING AT TD BANK

ally  CapitalOne  NAVY FEDERAL  TD Bank  PNC  WELLS FARGO
USAA  UMPQUA BANK  AssociatedBank  first tech credit union  usbank  Ent
MOUNTAIN AMERICA CREDIT UNION  SIMPLE  ARVEST BANK  TRULIANT
Federal Credit Union  RBC  Affinity Credit Union
OnPoint    COMMUNITY CREDIT UNION  IBERIABANK  AMERICA FIRST CREDIT UNION  EverBank
NUMERICA CREDIT UNION  TRIUMPH BANK
BANK OF THE WEST  more than just money  SCBU  Origin Bank  SIKORSKY CREDIT UNION  Scotiabank
State Farm  DCU  BMO Harris Bank  Meridian  Landmark Bank  Scottrade

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In-depth, half-day interactive sessions ($265 each). Register now and get **two workshops free** — a $530 savings!

### Digital Marketing Workshop: How To Build Your Strategy & Make the Shift

**Jim Pannos**  
Chief Executive Officer  
Pannos Marketing  
Wednesday, May 17th  
9:00 am to 12:00 pm

Digital marketing is changing the way financial institutions reach new customers. Is your strategy adapting to the changing ways that consumers now shop for financial products? This fast-paced, hands-on session will bring together all the necessary components of a successful digital marketing strategy, and show you best practices for developing an ROI-focused approach.

**WHAT YOU’LL LEARN:**
- How to Prioritize — Where you will get the most clicks for your dollars, and when to consider other channels that may not produce similar click-through-rates but help improve your overall performance.
- Building a Budget — What factors influence costs and where you can find efficiencies.
- Content Marketing — How does it fit within your overall digital marketing strategy.
- Analyzing & Managing Performance — Key performance metrics, what you should expect, and how you can improve results.
- Presenting to the C-Suite and Board — The right ways to engage senior leadership in digital marketing discussions.

### Growth Strategies Workshop: Aligning Marketing and Execution to Increase Profitability

**Dr. Sean C. Payant**  
Chief Consulting Officer  
Haberfeld Associates  
Wednesday, May 17th  
9:00 am to 12:00 pm

Aligning marketing initiatives and execution is critical to the overall success of your financial institution. In this informative workshop, you will learn proven, data-driven strategies to significantly increase accountholder acquisition, growth, and profitability. Learn the best practices today’s banking providers use to successfully tackle accountholder growth and engagement. This workshop will show you how to optimize your product strategies, policies and procedures, and sales processes to remove barriers to account acquisition. You will also learn effective, multi-channel targeted marketing strategies that yield superior performance.

**WHAT YOU’LL LEARN:**
- Specific strategies to increase core deposits, loans and non-interest income
- Consistent and proven approaches you can use to steal more market share from your competitors
- Proven methods of engaging new and existing accountholders to deepen relationships and improve retention
- How to build alignment between marketing initiatives and execution throughout your organization
- Strategies to significantly increase the acquisition rate of profitable retail and business accountholders
WORKSHOPS

In-depth, half-day interactive sessions ($265 each). Register now and get two workshops free — a $530 savings!

Strategic Planning Workshop: Finding Your Blue Ocean Strategy

Dr. Zunaira Munir
Senior Expert
Global Blue Ocean Strategy Network
Sponsored by MARQUIS

Wednesday, May 17th
9:00 am to 12:00 pm

Lasting success comes not from battling competitors in an already crowded marketplace, but by creating a “blue ocean” of opportunity — a new, untapped new space ripe for growth. That’s the driving principle behind the Blue Ocean strategy.

Based on the international bestseller that has sold more than four million copies, this approach is built on a decade-long study of more than 150 strategic moves spanning over 30 different industries. This rich, multi-media workshop includes interactive exercises that will give participants a practical jumpstart on developing their own Blue Ocean strategy.

WHAT YOU’LL LEARN:
• The logic, methodology and systematic tools you need to build your own Blue Ocean strategy
• How to apply a Blue Ocean strategy in your organization, using hands-on exercises
• How to innovate and create new markets while minimizing risk
• How to develop and align the three strategy propositions: value, profit and people
• Real examples and case studies of organizations that have created their own Blue Oceans of uncontested market space
• How to avoid the common traps that keep organizations anchored in existing market space

Onboarding & Cross-Selling Workshop: Winning Tactics for Community Institutions

Michael Browning
Chief Executive Officer
Onovative

Wednesday, May 17th
1:00 pm to 4:00 pm

You know it’s essential to connect with new account holders in their first 90 days, but most institutions aren’t doing enough to target them. A successful cross-selling strategy hinges on delivering the right offers at the right time. In this three-hour workshop, you will learn how to up your game with a cross-selling strategy that increases your share-of-wallet and accelerates the profitability of both new and current account holders.

WHAT YOU’LL LEARN:
• How to build an onboarding and cross-selling communications framework that achieves your institution’s strategic goals
• How to identify and prioritize ripe cross-selling opportunities that lurk in the data you already have
• How to drive ridiculous conversion rates by leveraging a combination of both digital media and print communications
• How to refine and focus your strategy by building and implementing feedback loops

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Brand Strategy Workshop:
Achieving Differentiation in the Sea of Sameness

Gina Bleedorn
Executive Director
Adrenaline

Wednesday, May 17th
1:00 pm to 4:00 pm

Brands today face an existential challenge: innovate or die. Today’s brands can’t hide — consumers demand transparency and a brand’s ability to adapt to consumer expectations is critical to their success. It is survival of the fittest, and only those brands that can create meaningful connections and provide tangible value to their audiences will be the ones that survive. Branding in the financial industry presents an even greater challenge: consumer engagement is low and differentiation is near impossible.

WHAT YOU’LL LEARN:
• How to make your brand relevant to the audiences you want to reach
• How to identify and understand your targets
• How to evaluate the competitive landscape
• How to develop a unique value proposition for your organization’s brand
• How to successfully launch your brand in your market

Branch Design Workshop:
Crafting Your Branch Experience in an Omni-Channel World

Anthony Burnett
Customer Experience Director
LEVEL5

Wednesday, May 17th
1:00 pm to 4:00 pm

Transactional efficiency is being displaced by a customer experience that drives engagement and grows market share. Study after study proves that when consumers need loans and credit-based products, they prefer face-to-face interaction in a branch.

In this workshop, you will learn how to construct an omni-channel branch experience — one that drives results by making emotional connections with both consumers and your community. This workshop brings substantive clarity and purpose to branches, and includes a step-by-step plan that produces returns for stakeholders.

WHAT YOU’LL LEARN:
• How to develop a total branch solution that drives engagement and market share
• How to develop your own play book for your branch experience
• How to link demography and market potential indices to your value proposition
• How to integrate powerful branding elements into your branch design
• How to select the right technologies and automation tools that connect with consumers
• How to layer in training to maximize your returns
• How to develop KPIs to track effectiveness and establish ROI
Loan Growth Workshop: Marketing Loans in the Digital Age

**Stephen Nikitas**  
Senior Strategy Director  
Harland Clarke  

Wednesday, May 17th  
1:00 pm to 4:00 pm

The ultimate goal of any loan marketing program is to generate more credit applications from quality customers as cost-effectively as possible. In this workshop, you will learn how to market lending products to both current account holders and new prospects in ways that will generate the highest ROI for your financial institution. Take loan marketing to a higher level — learn the strategies and proven techniques that will most efficiently achieve the best results in your future loan acquisition campaigns.

**WHAT YOU’LL LEARN:**

- How to build integrated direct marketing campaigns that grow your institution’s lending portfolio
- How to choose the communications channels that will drive the most loan/credit applications back to your institution
- How to use propensity scoring and predictive analytics to predict future purchasing patterns and target prospects with greater accuracy
- How to identify the credit products that hold the greatest ROI potential
- How to pre-screen consumers for credit campaigns while ensuring you comply with the Fair Credit Reporting Act and Firm Offer of Credit guidelines
The Financial Brand Forum 2017 will be hosted at the coolest hotel in Las Vegas — The Cosmopolitan. Situated in the heart of the Las Vegas Strip, this contemporary venue features living spaces with stunning private terraces and breathtaking panoramic views.

The Cosmopolitan — which emphasizes the resort experience over gambling — is the only upscale property in Las Vegas where you can attend a conference without having to pass through a casino.

With an extraordinary collection of 14 restaurants, three gorgeous pools, stylish art installations and a vibrant nightlife, staying at the Cosmopolitan is a lesson in branding itself!

Special room rate for Forum 2017 Attendees

$259 per night
May 12 – May 24

The reduced rate is only available until April 17, 2017 or until the room block sells-out. Don’t delay!

Book online at forum2017.com/venue

Reservations 855-435-0005
Be sure to mention you are attending the Forum 2017

THE COSMOPOLITAN of LAS VEGAS
Identifying and Implementing the Right Marketing Attribution Model

Korey Thurber, Chief Data and Analytics Officer at Harte Hanks

Robust attribution solutions rooted in statistical techniques and mathematical fundamentals must be a critical part of the modern marketer’s toolbox. Learn the different attribution models used today — which ones work, which ones don’t, and how to get your attribution solution off the ground.

What you’ll learn:

- Which attribution model you should implement based on your specific situation, goals, priorities and objectives
- How to integrate attribution data into your strategy to drive better decisions and improve results

The ROI of Digital Onboarding

Michael Balsimo
Former VP/Marketing Officer
Peoples Bank

Learn how Peoples Bank engages digital consumers in ways that produce greater retention rates, higher balances and more revenues.

What you’ll learn:

- How to get more customers to adopt and utilize the sticky digital services that increase their profitability
- How to build a program driven by product propensity and focused on cross-sell
- Where to start with your digital onboarding strategy, and what to plan for next

Acquisition Strategies: Getting Consumers to Make the Switch

Jim Dellavilla
Chief Client Officer at Catalyst

Consumers perceive the switching process as an unsavory, complicated and arduous chore. Who can blame them? In this session, you will learn five ways you can overcome inertia by optimizing your switching process.

What you’ll learn:

- How to boost your account acquisition success by streamlining your switching process
- The best ways to communicate with prospects who are looking to switch banking providers

The Forum 2017 agenda is packed with how-to sessions guaranteed to build both your brand and your bottom line.

We work closely with our lineup of all-star speakers to carefully craft an agenda that’s all about “how to” instead of “why you should.”

Arm yourself with concrete ideas, practical strategies and actionable advice about the most critical branding, marketing and advertising problems you face today — candid, direct, honest and focused on results.
How to Transform a Traditional Community-Based Institution Into a National Digital Bank

Carie Kelly
AVP/Direct Channel Manager
Radius Bank

Jeff Nowicki
AVP/Partnerships Manager
Radius Bank

Not long ago, Radius Bank had six branches. Today, with just one branch, Radius effectively serves customers in all 50 states through a digital retail platform built with an amalgamation of fintech partnerships. In this session, Radius will show you how to leverage a combination of digital marketing and innovative fintech solutions so you too can attract deposits from customers across the nation. Learn what works, what doesn’t, and what to avoid from an experienced team that spent their time in the trenches.

What you’ll learn:

- How to pull off the transition from brick-and-mortar delivery model and go fully digital
- How to acquire customers online instead of in branches
- How to transform a traditional community-based institution into a national digital bank
- How to choose the right fintech partners so you can rollout innovative new digital services/solutions
- How marketing can successfully position a smaller institution against multi-billion dollar big bank behemoths
- How to build your digital media marketing plan to support a virtual model
- How to leverage new marketing technologies in ways that directly drive sales

Customer Experience Marketing Strategies for the Modern CMO

Chris Snook, VP/ Business and Corporate Development at Ethology

In the Digital Age, achieving amazing marketing results hinges on delivering amazing customer experiences. Best-selling author of Digital Sense Chris Snook will show you how to use an Experience Marketing Framework to effectively engineer a 360 degree marketing plan that delivers measurable ROI.

What you’ll learn:

- How to link marketing, technology and the customer experience in a single, cohesive strategy
- How to align the digital transformation of your institution with the increasing demands of today’s consumers

Winning Small Business Banking Relationships

Bill Handel
VP/Research & Development
Raddon, a Fiserv company

Two out of every three small businesses do business with a megabank. How can you go toe to toe with the industry’s biggest players and be competitive? Learn how your institution can more effectively meet the needs of small businesses, and where you need to address their priorities and preferences in your marketing.

What you’ll learn:

- How position against megabanks and capture more of the small businesses market
- What to focus on when marketing to small business customers
7 Human Behavior Hacks That Increase Engagement and Response Rates

Nancy Harhut
Chief Creative Officer
Wilde Agency

Research proves people are hard-wired to behave in ways that follow predictable patterns. Even though consumers think they are in control, they make up 95% of their purchase decisions subconsciously and instinctively, and these automatic behaviors can be prompted. By injecting proven principles of social science into your marketing campaigns, you will significantly increase both your response rates and your ROI.

What you’ll learn:

- The psychological triggers that drive consumers’ decisions and influence choice
- How to incorporate consumer psychology into your marketing strategy
- How to leverage surprisingly persuasive scientific principles like availability bias, scarcity, social proof and choice architecture

Lessons From The World’s Digital UX Leaders

Dave DeFazio
Partner at StrategyCorps

A handful of companies like Facebook, Starbucks and Uber have raised the bar in the mobile channel, radically redefining consumers’ expectations. What mobile apps do people love, and how do they prefer to interact with them? This session will focus on live demonstrations of the mobile apps that are reimagining everyday banking tasks, and show you what your institution needs to do to keep up. Live demos include: Venmo, Simple, Digit, Penny, Uber, Amazon, Bank of America, and Starbucks.

What you’ll learn:

- Ideas that your institution can steal from the world’s leading retailers and UX designers
- Lessons from social media apps that can make mobile banking easier and more intuitive for customers
- How fintech innovators are using mobile apps to threaten the role and relevance of traditional banking providers
- How leading retailers (and not banks) are simplifying everyday banking tasks for consumers
- How robo-bank apps and algorithms are automating financial advice
- How social payment apps are winning the battle for millennial customers
- How new products from the biggest banks will change mobile payment standards in the next 12 months
- How innovative new mobile banking apps are addressing the security fears of today’s banking customers
- How rewards and geo-location tools can help your institution connect better with customer mobile lifestyle
**Proven Strategies to Shape Your Institution's Culture**

Jim Perry  
Senior Strategist  
Market Insights

There is growing awareness that culture is critical to both the customer experience and marketing success. Yet financial institutions end up with a jumbled culture that diminishes productivity and limits success.

This session will look past the obvious tactics of influencing culture through training and hiring; and share the practical, everyday practices that senior leaders can utilize to actively and intentionally shape their culture.

**What you’ll learn:**
- Three reasons most culture change initiatives fail, and how to avoid them
- How to identify and manage the drivers of culture
- How to improve employee engagement and help employees transform old habits
- How to demonstrate the connection between new cultural behaviors and marketing success

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**Using Marketing Metrics and Media Models to Optimize Your Strategic Plan**

David Kerstein, President at Peak Performance Consulting Group

How should you balance spend across multiple channels and justify your budget? Learn tangible ways in which you can increase marketing ROI, with practical examples tailored to the needs of community/regional banks and credit unions. Includes lessons you can take home and implement immediately.

**What you’ll learn:**
- How to increase marketing efficiency and generate more sales by allocating and optimizing marketing dollars across media channels

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**Leveraging Social Media Channels to Advertise Financial Products and Services**

Meredith Olmstead, Founding Partner at SocialStairway

How can social networks be used for more than just “engagement?” This session answers financial marketers’ big questions about paid social media marketing programs, including examples and case studies.

**What you’ll learn:**
- The various advertising models and pricing options available on the top social media platforms
- How much (if any) of your marketing budget should be allocated to social media

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“Refreshing! Finally a conference with so many valuable takeaways — simply awesome.”  
— KIM GUNAKA, VP/GREAT LAKES BANK
Rethinking Growth Metrics and Digital Marketing ROI in a Mobile-First World

Joe Meier
Principal Analytical Lead
Google

Online advertising revolutionized marketing measurement, but now mobile has revolutionized the digital space. Over 75% of online adults ages 18-54 start an activity on one device, then continue (or finish) it on another. 76% of people who search on their smartphones for something nearby ultimately visit a brick-and-mortar location that same day.

And yet many financial brands are still relying on legacy desktop marketing metrics to drive strategy in a world that’s gone mobile. Mobile creates massive new opportunities to engage with consumers for financial institutions that rethink their business objectives and ROI metrics.

What you’ll learn:
- What Matters - How to align your internal teams to the business objectives and marketing metrics that matter most in a mobile first world
- What’s Working - How to identify gaps in your measurements and fill them with new tools and metrics
- What’s Possible - How to focus on total potential growth, not efficiency or optimization of individual campaigns, devices and channels

The Financial Marketer’s Guide to Picking the Right Marketing Automation Platform

Robert McKinnon, Practice Leader/Fin. Services at SiriusDecisions

There is no shortage of marketing automation platforms out there to choose from today — Salesforce/Pardot, Marketo, HubSpot, IBM/Silverpop, Oracle/Eloqua, Adobe Marketing Cloud. But which one is right for you?

What you’ll learn:
- Financial industry best practices to optimize your investment in a marketing automation platform (MAP).
- Common challenges and pitfalls for financial institutions looking to implement a new MAP platform.
- How to assess the functionality that is essential for your institution’s needs and resources.

Paid to Play: Engaging and Rewarding Your Own Social Media Community

Ed Boyle, Managing Director
Fidor Americas Bank

Can a retail financial institution build its own social media platform? Yes. Learn how Fidor uses its community to acquire new customers, increase retention, drive Net Promoter Scores and lower operating costs by strategically incentivizing and rewarding people for various digital behaviors.

What you’ll learn:
- How to build a proprietary social media community that you own and manage
- How to drive engagement and lower costs by using social media tactics that empower consumers

DON’T WAIT, REGISTER NOW!

Over 1,500 of your peers and competitors will be at the Forum 2017 when it kicks off May 17th. Will you be there?

info@financialbrandforum.com 206-661-5070
forum2017.com
Marketing Strategies for Loan Growth in an Omni-Channel World

Kesna Lawrence  
Chief Data Scientist at Deluxe

Financial marketers are struggling to translate their traditional campaigns into new digital channels, and most haven’t deciphered the omni-channel riddle. With the massive volume of data that’s now available right at your fingertips, audience profiling has reached new levels of sophistication making it possible to target the same prospects in every channel with a consistent, specific message that drives real results.

What you’ll learn:
- How to leverage response profiling, predictive modeling, hierarchy strategies, and list optimization to trigger more loan applications

How Predictive Analytics Can Deepen Customer Relationships

Steven Ramirez  
CEO at Beyond the Arc

New technologies and emerging channels are generating rich sources of valuable data that financial marketers must turn into actionable insights. Learn how predictive targeted marketing can produce higher response rates and increase ROI without a proportional increase in costs.

What you’ll learn:
- How to translate your raw data into actionable marketing strategies
- How to build algorithmic models that strengthen relationships, maximize revenues and reduce customer attrition

How Regions Bank Drives Revenue Through Social Media

Melissa Musgrove  
VP/Head of Social Media at Regions Bank

Regions Bank is one of the most successful financial institutions in the world when it comes to social media, active in no less than nine different social networks. Learn how to approach your strategy, craft your content, and leverage social media channels to achieve business objectives.

What you’ll learn:
- How social media plays a central role in Regions’ cross-channel, integrated marketing campaigns
- How Regions engages customers and prospects through compelling content

Personalized Cross-Selling: How to Increase Engagement Through Extreme Personalization

David Sosna  
CEO/Co-Founder Personetics

By delivering timely, personalized, and highly contextualized offers to each individual, financial marketers can dramatically increase engagement and response rates that go beyond any conventional cross-selling strategies.

What you’ll learn:
- How to increase response rates by offering consumers contextual guidance and advice tailored to their situation
- How to turn your customer data into valuable insights that will foster engagement, loyalty and trust
- How to personalize interactions and create “aha” moments
Harnessing the Power of Data Analytics to Achieve Strategic Brand Alignment

Martin Kelly
CMO
Firefly CU ($1.1B assets)

It’s critical that your institution’s overarching strategic plan tie everything together — growth goals, retail delivery channels, internal culture and external brand experiences. If you’re not using the power of data analytics to drive these decisions, you’re behind the curve.

In this session, you’ll learn how leading financial institutions are leveraging insights gleaned through data analytics to achieve strategic clarity and improve their marketing ROI.

What you’ll learn:
• How data-driven insights will help you build alignment among key stakeholders for your institution’s strategic plan and future vision
• How to leverage data analytics to align your brand strategy with business objectives, redefine your customer experience, and create a clear roadmap for future technology and branch plans
• How to integrate psychographic modeling, lifestyle segmentation and heat map scoring into your marketing and growth plans
• How a $1 billion financial institution uses data to bring renewed focus to their corporate growth initiatives

Revitalizing the Overlooked Touchpoint in Your Omnichannel Strategy

Brennie Conkle
VP/Customer Strategy at Invoca

Financial marketers may have dismissed the phone as an antiquated point of contact, but inbound calls are pouring in from digital channels — converting at 10x the rate of those who purely click. New tools and technologies are bridging the gap between inbound calls and your digital marketing strategy.

What you’ll learn:
• How to accurately track calls generated from digital channels
• How data gathered during the call (intent to purchase, demographic data, geographic location) can be used to automate personalized follow-up emails and display ads.

Advanced Search Strategies That Go Beyond SEO and PPC

Wil Reynolds, Director of Digital Strategy at Seer Interactive

Learn how today’s advanced marketers use Google to better understand consumers. As one of the world’s foremost authorities on SEO and search strategies, Wil will show you how to turn Google into a research engine that generates actionable marketing insights. A mix of both strategy and tactics, this presentation will change the way you look at Google forever.

What you’ll learn:
• How to identify threats in changes to search results, and how to pivot your strategy
• How to extract more value and results from the top rankings you already have
Creating Insanely Effective Marketing Campaigns by Embracing the Power of Experimentation

Pete Koomen
Co-Founder and CTO
Optimizely

In a digital world, marketers should be testing everything — from ads and landing pages, to email subject lines and photos. Even testing something as simple as one button that says “Click Here” vs. one that says “Learn More” can have a staggering impact, with the winner generating four times as many clicks. In this session, you’ll learn how to use the power of experimentation to magnify and accelerate your marketing ROI, with case studies, best practices, and lessons learned from hundreds of thousands of real-world tests.

What you’ll learn:
- How financial institutions can integrate a culture of high-velocity experimentation into their marketing
- How you can implement A/B split testing to maximize marketing effectiveness
- Tools, tips, tricks and techniques you can use to optimize the performance of your marketing campaigns

Rewarding Employees to Build an Internal Branded Culture

Shelly Loftin
Chief Marketing Officer
Bear State Bank

It’s this simple: anything that isn’t measured and rewarded doesn’t matter. In this session, Bear State Bank will show you how they engage employees and encourage them to “live the brand” with an employee rewards program consistent with their culture.

What you’ll learn:
- How to connect employee incentives with your corporate culture, mission, vision and values
- How to build a program that rewards employees quickly, easily and publicly for their on-brand behaviors

Overcoming the Three Biggest Digital CX Disconnects in Banking

Craig McLaughlin
CEO of Extractable

In this practical and prescriptive session, learn how the most effective ways that you can quickly evolve your digital presence with a comprehensive digital strategy that addresses your fundamental business goals vs. just bolting on the features of the latest ‘fintech du jour.’

What you’ll learn:
- How to build a comprehensive, integrated, and holistic digital strategy — who creates it, and the components that should go into it
- How to manage the digital transformation process to generate internal support among key stakeholders
Marketing Banking Products in an Image-Driven Culture

Andrew Davidson, SVP/Chief Insights Officer at Mintel

In today’s time-constrained, hyper-wired world, you have just seconds to get your message across. As speed, convenience and ease-of-use become increasingly critical to consumers, tapping the power of images in your marketing has become immeasurably valuable.

What you’ll learn:
- How consumers’ shortening attention span impacts marketing and how financial institutions must adjust their messaging
- How to leverage the substantial opportunities that visual communications afford and streamline your messaging in bold, new and engaging ways

Building Powerful Brand Strategies: Taking a Fresh Approach

Tim Bennett
Chief Brand Officer at TDECU

This session exposes the common flaws, challenges and shortcomings of weak brand strategies built on outmoded models and techniques. Discover a fresh approach to building brand strategies and learn new branding methods that can truly guide your organization — from marketing and CX, to product development and employee behaviors.

What you’ll learn:
- New tools and techniques that support every step in the brand strategy process
- How to construct the right market segmentation model you need to develop a truly powerful, relevant and differentiated brand strategy

Leveraging Financial Education to Grow Relationships

Steve Rice, EVP at EverFi

Can a financial education program contribute to the bottom line? Yes. Research has proven that financial education builds trust and loyalty with consumers, thereby providing valuable opportunities to deepen relationships. Learn how to use educational content to capture more market share and greater value from consumers.

What you’ll learn:
- How to increase engagement, loyalty, satisfaction and conversion rates with a content marketing strategy built around a robust financial education program
- Where to implement lead generation mechanisms that harness the true potential of financial education content

Effective Merger Communications Strategies

Rick Hall, Managing Director of Banking and Financial Services at BKM Marketing

Few situations are more critical than the first impressions created during a merger. What can financial marketers do to make customers view mergers positively? How should you engage employees and other key stakeholders? What can the acquiring institution do to mitigate customer attrition?

What you’ll learn:
- How to build a solid merger communications strategy that conveys the unique benefits of the acquisition
- Best practices to create a “wow” first impression and yield a positive onboarding experience for your new customers
Don’t wait! Time is running out. Register now, before it’s too late!

Your registration fee includes an all-access pass, three lunches, two breakfasts, two cocktail receptions, a digital copy of The Financial Brand Bible, the 2017 Bank & Credit Union Marketing Trends Report, and the Forum 2017 USB Toolbox — a flash drive loaded with white papers, research reports and digital copies of all sessions (total value worth $4,670).

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