

OCTOBER 28-29

2019 NEFMA

Fall Conference & Social Media Awards

PORTSMOUTH HARBORSIDE HOTEL, PORTSMOUTH, NH

Why Lawyers Nix Your Cool Marketing Ideas (and How to Change That)

Kerry O'Shea Gorgone

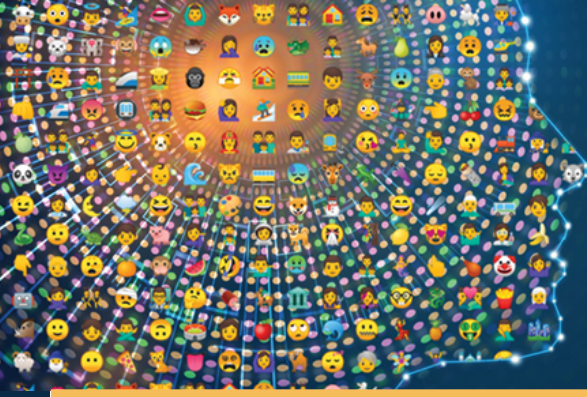
There's no law school class in "How to Suck the Joy Out of Everything," but the way the legal department redlines your financial services marketing campaigns can make it seem like there is. Lawyers don't mean to ruin your fun. They're on your side! In this presentation, attorney Kerry O'Shea Gorgone will offer insight into the main reasons lawyers reject marketing campaigns (copyright concerns, accidentally illegal influencer campaigns, and uncontrolled risks in live streaming video), so you can plan marketing campaigns that will pass muster with your legal team.

Effectively Use Social Media to Advance Your Bank's Brand

Amber Farley

In this keynote session, we discuss the strategy and planning required to succeed in the fast-changing world of social media marketing. Social networks are constantly stepping up their game to keep users engaged and entertained. Your organization's social strategy should be doing the same. Whether you're focused on becoming a trusted resource, humanizing the bank, highlighting community involvement, promoting bank products, developing business opportunities, or extending your customer service offerings, this session will show you how to achieve results in the social space by incorporating the following six truths.

1. **Appealing** – If you want to build a strong social audience and customer base, you have to be appealing. With today's vast array of banking options within the financial industry, your bank's brand, culture, staff, products, technology and service standards need to be attractive to your audience.
2. **Authentic** – Authenticity is more important than ever. Consumers no longer need perfection from a company. They crave authenticity. Be who you really are and nothing else. You'll be applauded for it.
3. **Approachable** – When done right, social media can humanize your bank's brand and help create a desire for consumers to want to be a part of your story.
4. **Accessible** – In today's hyper-connected world, customers expect quality service from companies they do business with and expect it fast. Sometimes it's through self-service and other times through contacting an actual customer service rep. We live in a world inundated with real-time interactions, instant feedback, agile platforms, and cross-channel experiences, so it's important that you are always accessible to your customers—whenever, wherever and however they want to connect with you.
5. **Admirable** – Today's customers want to spend their money with companies and brands that they admire. They often choose to do business with companies and brands that share the same values that they personally hold near and dear.
6. **Adaptable** – Because social media changes so frequently, it's critical that you have a passion for learning and trying new things within the social space. Failures will happen, but you will miss out on opportunities if you don't at least try.



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Improving the Small Business Customer Experience

Stu Richards

How much do small business owners (SBOs) trust different industries, including different kinds of financial service providers – and individual banks and alternative lenders? How are SBO attitudes towards alternative lenders evolving? What kinds of credit are SBOs using – or do they plan to use – from banks and alternative lenders?

To answer these questions, small business marketing consultancy Bredin recently surveyed 500 U.S. SBOs. Join Bredin CEO Stu Richards for a fast-paced review of the research results.

You'll learn:

- The 2019 SBO business outlook
- SBO trust in 26 different industries, from alternative lenders to wireless service providers
- SBO awareness of and trust in 28 leading banks and over 50 alternative lenders
- Bank and alternative lender industry Net Promoter Scores
- How banks are under and over-performing against SBO preferences
- Current use and providers of credit products – including business credit cards, savings and checking accounts, loans, LOCs, factoring and MCAs
- Planned use and potential providers of credit products
- How SBO attitudes towards alternative lenders have changed
- The media that work to engage SMBs
- How to boost awareness and trust via content marketing

You'll get key differences among SBOs by revenue, growth rate, respondent age and more.

Understanding the 'New England banking decision maker'

Stephanie Gonthier

Retail banks are undergoing a major transformation. Technology, shifting demographics, and emerging Fintech competitors are changing the banking landscape very quickly. Based on primary market research data collected from New England banking decision makers in summer of 2019, we'll examine the New England banking market. We'll look at the competitive landscape, how your target audience makes banking decisions, and how you can more effectively grow your customer base and increase loyalty.

Cannabis Discussion Panel

Pamela Buckley, Gary Vierra, & Steven J. Hoffman