

2019 NEFMA Spring Conference SESSIONS

REIGNITE YOUR
MARKETING
SUPER POWER!

WORKSHOPS

THURSDAY, MAY 9 1:30-3:45PM

Chase Bank Is Targeting Your Customers. Are You Ready?

James Briand & Bill Muto, NexTier Partners

JP Morgan Chase president Jamie Diamond has declared his intention to be the dominant surviving national bank in ten years with aggressive investments in service delivery, mobile banking, distinct online bank platforms as well as traditional face to face service. Already the largest bank in the US, Diamond is determined to achieve a dominant position in the markets Chase does not currently serve including Boston and Providence. To achieve this, Chase will open 60 new branches in MA and RI in the near future, and will aggressively leverage their substantial existing credit card, mortgage and auto loan relationships with area residents. NexTier Partners has conducted proprietary primary research with area customers to measure their receptivity to the promised Chase value proposition, with special focus on the appeal for community bank customers and those that already have secondary Chase relationships. NexTier presenters will share the results of those studies at this exclusive NEFMA workshop. NexTier will also share insights from bankers in current Chase markets on how to best compete with Chase. This workshop is a must-attend for every financial institution marketer that wants to stay ahead of the changing New England Marketplace.

Digital Trends on the Rise

**Amanda Rowe & Melanie Coleman,
Pannos Marketing**

As digital marketing opportunities continue to evolve, your marketing strategies need to advance with them. Lately, it seems like every Monday morning there's a new technology or advertising opportunity in the works or on the rise waiting for you in your inbox. How can your financial institution stay ahead of the game, or at least keep up? With so many trends floating around the

digital space, there are some you can't afford to ignore anymore, notably artificial intelligence (AI), SEO and voice search, and personalization. Many of these require an investment, so do you show a return? Fortunately, the digital evolution comes with advanced attribution tools, giving you greater insight into your efforts.

Big Ideas for Bank Marketing

Jim Perry, Market Insights, Inc

Strategies to shake up the status quo in 2019 Customer expectations are at an all-time high and only tile creative, agile marketer will be able to help their institution stay competitive. Innovative new tools, platforms, and technologies continue to disrupt the bank marketing landscape. This annually-updated session explores emerging consumer behaviors and the marketing trends that should guide strategic choices in 2019.

This session is designed to inspire innovative thinking and help bank marketers navigate an increasingly digital landscape. Participants will look at tangible ways to move beyond the basics and breathe new life and success into their marketing efforts.

Achieving Material Yet Efficient Deposit Growth through Strategic Analytics and Marketing

Tim Keith & Trevor Knott, Baker Hill

Deposit growth is in many ways, the core challenge of the industry in 2019, but not all deposit growth is equal in value and sustainability. This talk will reveal fundamental assumptions necessary to achieve your deposit growth goals in a manner that is profitable and sustainable over time. Client case studies will be shared from recent successful deposit growth initiatives at community banks and credit unions.

3:45 - 5:00

Break/Check-In

4:00 - 5:00

Mentor Session

2019 NEFMA Spring Conference

SESSIONS

REIGNITE YOUR
MARKETING
SUPER POWER!

NETWORKING RECEPTION

THURSDAY, MAY 9 5-8:00PM

Super Powers Ignite!

You don't want to miss this networking event! We promise it is like no other. We will unite in teams where you will create a super hero costume! Better yet, you will present your creation to the judges where they will be critiqued on creativity, use of materials, overall theme and presentation from the team. There will be a prize for best costume! Cocktails and hors d'oeuvres will be served throughout the evening.

GENERAL SESSION - FRIDAY, MAY 10

7:45 - 8:45

Super Charge Your Mind and Body - Providence Power Yoga

Learn how to take a few minutes out of your day to quickly reconnect and unwind. Who doesn't need this, right!! This session will teach you how to reduce stress quickly and refocus your energy. After all, your mind and body hold all of your super powers! Namaste'.

9:00 - 10:15

How to Relocate Your Super Brand! Rebranding in a New Market - Rob Crain, SVP Marketing for Pawsox

Rob will discuss the decisions and research that went into the move to Worcester from Pawtucket. What does it take to rebrand in a new area? How important are B2B Alliances, and why Worcester? We think Rob has some pretty cool super powers that he can share with you!

Q&A with Audience

10:45 - 12:00

KEYNOTE:

Eruption Not Disruption: Super-Duper Customer Experiences That Attract Customers and Loyalty Brian Carter

Oh no! Another villainous disruptor with sinister tech superpowers just thwarted yet another organization by kidnapping its customers! Wait,

what's that in the sky? Never fear! Business leader, former stand-up comedian and current-superhero Brian Carter is here!

In this fun and uplifting program, you'll see how customer experiences and expectations everywhere are changing. Brian will highlight social, economic and technology trends affecting the financial industry today and how top performing marketers attract more customers, regardless of budget. In this amazing and engaging program, you'll learn how to use your own "disruption superpowers" to create an invincible customer experience and erupt with success!

You'll also discover:

- Why customers see themselves as the heroes and how your organization fits into their adventures.
- The best superpowers (innovative tech) to adopt in the financial marketing world today.
- How customer expectations are changing and where they are right now.
- The five keys to a delightful - and invincible - customer experience.
- The tools top banks and credit unions are using to resonate with their markets.
- How to make today's customers happy enough to stay with you forever!

Q&A with Audience

1:15 - 2:30

The Power of Internal Branding: How to Unite and Ignite Human Capital Sean Hockenbery, Executive Vice President FMS

A great brand starts from within; you need a strong culture and brand belief internally so that your message is consistent externally. Fortunately, when brand becomes the focus of the bank, employees have a common goal they can direct their efforts on, they have a rally cry, they understand the bank's vision, and teamwork becomes second nature. In this session, we will discuss the value of building an internal brand culture, share examples of internal brand alignment, and provide action steps for igniting the team to have a greater impact on the performance of the bank.

Q&A with Audience