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TOPIC SUMMARIES

Helping **mark** financial institutions for success.

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BRANDING & MARKETING

Top 10 Marketing Trends Every Financial Institution Should Know	1
Got Brand? Successful Financial Institution Branding Strategies	1
eMerging Technologies & Mobile Marketing	1
It Takes A Village: Community Charter Marketing	2
Building A Lasting Brand—Branding for Financial Institutions	2
Social Media Made Simple	2
More than Service: Advanced Sales Techniques	3

STRATEGY & LEADERSHIP

Developing A Vision: Strategic Marketing & Planning	3
¿Se Habla Español? Developing A Hispanic Marketing Strategy	4
Developing the Ultimate Strategic Plan	4

GENERATIONS

Pearl Harbor or Pearl Jam? Marketing Across the Generations	4
Why Y: Strategies To Reach the Dot-Com Generation	5
Xasperating to Xillerating (How To Work With Generations X & Y)	5
When Employees Act Their Age: Generational Differences in the Workplace	5

PERSONAL GROWTH

Think Huge: How to Elevate Your Life and Your Financial Institution	6
Transformational Leadership: Going from Managers to Leaders/Mentors	6

**Other customizable topics in these areas are available upon request.*

*General session and breakout session topics
Presentations are customizable to meet specific audience needs
Topics for executives, management, directors and staff*



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BRANDING & MARKETING

Top 10 Marketing Trends Every Financial Institution Should Know

Financial institutions must become savvy marketing organizations to survive in the future, which means they must have a working knowledge of this key field. As a marketing executive and author, Arnold provides thoughtful insights for financial institutions to consider. This session examines trends including:

- Marketing & technology fields merging
- CRM will dominate
- Sales culture rules!

Note: This session can be modified for staff and managers.

Got Brand? Successful Financial Institution Branding Strategies

Does your financial institution have a strong brand identity? When your members see your financial institution's logo or hear the financial institution's name, does a consistent image come to mind? By giving brands distinctive qualities, brand marketers create loyalty for their products, services and financial institution. Having led his financial institution through a name change process, Arnold provides practical information on what to do and not do with your financial institution's brand. This session provides:

- The lexicon of branding
- Brand benefits
- Tactics for implementing a branding program
- Brand consistency

eMerging Technologies & Mobile Marketing

IM. Live chat. Text alerts. Social networking. Viral marketing. Blogs. Podcasting. Are these emerging technology marketing trends or just the latest fads that will fade away? As the marketing and technology fields merge, marketing executives must have a firm grasp on the latest technologies and how to best use them to reach their customers. This session will cover:

- Technology strategies and trends
- eMerging technologies
- Benefits & best practices
- Implementation tactics

As an award-winning marketing executive and author, Arnold provides thoughtful insights for financial institutions to consider.



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BRANDING & MARKETING

It Takes A Village: Community Charter Marketing

Successful financial institutions must be involved in community activities. However, true community charter marketing is much more than being at an event here and there: it takes a strategic approach. More and more financial institutions are evolving into organizations serving larger populations. As a senior vice president who led his financial institution with a community emphasis, Arnold offers information and ideas for maximizing your reach into your communities. This session covers:

- Community marketing strategies
- Targeting your community
- Community marketing tips and tactics
- Formula for successful community marketing

Building A Lasting Brand—Advanced Branding for Financial Institutions

Branding is more than just changing a few brochures or the look of a newsletter. Much more. A true comprehensive branding program will take years to develop and will impact the entire organization. Your financial institution doesn't just "do" branding one year and mark it off its "to do" list: your financial institution must "live" the brand every day. Having led his financial institution through a name change and ongoing branding efforts, Arnold provides practical information on what to do and not do with your financial institution's brand. This session provides:

- Maintaining Brand Consistency and Momentum
- Lovemarks & Emotional Branding
- Gaining Staff Buy-In
- Brand Leadership in the 21st Century

Social Media Made Simple

Blogs. Facebook. Twitter. YouTube. Flickr. MySpace. Web 2.0. It's enough to make anyone's head spin. But understanding and using social media effectively is a key strategy for financial institutions connecting with their members. This session covers everything you need to know about social media: from the basic to the advanced. Social media is not about using all the new toys to be hip, but rather about engaging your members. As a marketing executive and author of two blogs, Arnold provides thoughtful insights for financial institutions to consider. This session covers:

- Using social media to reach members
- Incorporating social media into marketing and strategic plans
- Social media tips and tactics



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BRANDING & MARKETING

More than Service: Advanced Sales Techniques

Everyone is in sales—and sales is not a dirty word. In fact, sales is the lifeblood of any organizations. If your employees aren't selling then your organization will die a slow and painful death. But sales is more than just smiling, using the person's name, and making eye contact. Much more. For your organization to succeed your sales team must employ advanced sales techniques. As a seasoned executive with over 20 years in sales experience, Arnold shares tips and ideas to take your sales force from average to great. This session covers:

- Advanced sales strategies
- Using real networking skills to connect with people
- Sales tips and tactics
- Building a referral based sales system

STRATEGY & LEADERSHIP

Developing a Vision: Strategic Marketing & Leadership

Newsletters. Inserts. Brochures. Direct Mail. That's all that is involved with financial institution marketing. NOT! While that may have been the case 10 years ago, financial institution marketing now requires advanced applications. For financial institutions to successfully compete in today's competitive environment, they must have a clear vision and a strong plan. They must have strategic marketing and planning. As a financial institution marketing executive, Arnold provides hands on instruction for planning your marketing efforts. This session covers the following points:

- Strategic marketing planning
- Implementing the marketing plan & measuring performance
- Writing a financial institution marketing plan



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STRATEGY & LEADERSHIP

¿Se Habla Español? Developing A Hispanic Marketing Strategy

Does the “Got Milk?” campaign work in Mexico? Hardly. The Spanish translation for “Got Milk” is “are you lactating?” Simply translating marketing campaigns into Spanish can lead to failure. The Hispanic population is the fastest growing population segment in the United States. Wanting to market to Hispanics is different than doing so successfully. As the person responsible for his financial institution’s Hispanic initiatives, Arnold offers ideas for reaching this demographic. This session provides:

- An overview of Hispanic statistics and demographics
- Products Hispanics tend to want and segments within this group
- Strategies for reaching Hispanics
- Tactics for serving the Hispanic community

Developing the Ultimate Strategic Plan

Successful financial institutions have sharp strategic plans. Organizations that consistently plan well enjoy success more frequently. As author Jim Collins notes in his book *Good to Great*, “good is the enemy of great.” Ultimate strategic planning sessions focus on how to ensure your financial institution does not settle for good, but strives to be great. This session covers:

- The strategic funnel
- How to put zing into your planning sessions
- The magic ingredient to the ultimate strategic plan
- Tips for improving your strategic plan

GENERATIONS

Pearl Harbor or Pearl Jam? Marketing Across The Generations

Rotary phones. Touch-tone phones. Cell phones. Each generation identifies itself with unique cultural images. Consumers active in today’s marketplace can also be divided into four distinct groups: Matures, Baby Boomers, Xers and Dot Comers. Your willingness and adaptability as an aggressive marketer will determine how successful you are in reaching and bridging these critical age ranges. As a financial institution marketing executive, Arnold gives key points on how to conduct generational marketing. This session provides:

- An overview of Matures, Baby Boomers, Generation X and Generation Y
- Practical ways financial institutions can market to each generation
- Financial products each generation finds appealing



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GENERATIONS

Why Y: Strategies To Reach The Dot-Com Generation

"Never trust anyone over 30." If that popular movie line is correct, how can financial institutions reach anyone under 30? For financial institutions to survive in the future, they must successfully market to the 18-35 year old age segment. Arnold presents information about one of the most misunderstood groups of people: the Dot-Com Generation. This session provides:

- An overview of the Dot-Com Generation
- Practical ways financial institutions can market to Dot-Comers
- Financial products Dot-Comers find appealing

Xasperating to Xillerating (How To Work With Generations X & Y)

"I don't understand my Xer employees," is a refrain heard often among financial institution officials. Relating better to GenX employees helps financial institutions improve their productivity. This session offers:

- An overview of Generations X and Y
- Making the work environment appealing to Generations X and Y
- Supervising Generations X and Y

When Employees Act Their Age: Generational Differences in the Workplace

Work as duty. Work as means to leisure. Work as a challenge. Different generations approach employment differently. Employees active in today's labor market are divided into four distinct groups: Matures, Baby Boomers, Xers and Dot Com Generation. Your willingness and adaptability as a progressive supervisor will determine how successful you are in managing and bridging these critical age ranges. As a manager of multiple generations, Arnold gives critical points on how to better work with each unique group. This session provides:

- An overview of Matures, Baby Boomers and Generations X and Y
- Making the work environment appealing to different generations
- Supervising various generations
- Creating an intergenerational work environment



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PERSONAL GROWTH

Think Huge: How To Elevate Your Life and Your Financial Institution

In late 2002, owners of the different looking casual shoes “Crocs” sold about 1,000 pairs of shoes over one weekend. When sharing their idea with a new business partner, he had two words for them: “think huge.” Just four years later, Crocs were selling over 6 million pairs of shoes per year. How did they go from 1,000 to six million pairs: they thought huge. How do you build a successful career and life: you think huge. This session provides:

- Think vision
- Think passion
- Think people
- Think learning

As a motivational speaker, Arnold provides insights from his adventures climbing the tallest peak in the continental United States (Mt. Whitney) and running multiple marathons.

Transformational Leadership: Going From Managers to Leaders/Mentors

“Everything rises and falls on leadership,” writes author John Maxwell. The challenge for many financial institutions, however, is that too many supervisors are managers and not leaders. Whether it is a teller supervisor, branch manager, vice president or even “chief,” all organizations need not just managers but leaders/mentors. As a financial institution executive, Arnold gives practical ideas on how to transform business managers into leaders/mentors. This session offers the following:

- The difference between managers
- Staff development techniques
- Cultivating your staff's strengths
- Mentoring tips and tactics
- Creating a mentoring culture



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