



# ON THE MARK STRATEGIES

LEADING, GUIDING AND BLAZING TRAILS FOR CREDIT UNIONS SUCCESS

## KEYNOTE PRESENTATIONS



### BRANDING AND MARKETING

- Building a Lasting Brand For Banks
- Top 10 Marketing Trends Every Bank Should Know
- Emerging Technologies and Mobile Marketing
- Pearl Harbor or Pearl Jam: Marketing Across the Generations

### STRATEGY AND SALES

- Who is the Customer of the Future
- Developing the Ultimate Strategic Plan
- Customer Engagement: Service and Sales Solutions

*We can also speak on subjects such as increasing member retention, connecting with the Millennial Generation and becoming a more effective bank leader.*

To book Mark Arnold or Taylor Wells call 214.538.4147 or e-mail Mark at [mark@markarnold.com](mailto:mark@markarnold.com)



## BRANDING AND MARKETING

### TESTIMONIALS



*"The best I've ever heard.  
Even better than Zig Ziglar."*

Florida Audience Attendee



*"I have worked for two  
different banks and now  
a credit union, and the  
differences between their  
training methods and yours,  
well were mind blowing. I  
definitely took more away  
from your training than any  
other training provided me."*

Pennsylvania CU official



*"The insight that Taylor  
presented was very helpful  
and enlightening. It's a  
daunting challenge to tackle  
something like marketing  
that has a lot of intangibles  
associated with it. To  
have someone like Taylor  
explain that in easy-to-  
understand terms and  
also have the ability to  
implement that is something  
I found very helpful."*

John Hancock  
Chairman, Security Bank  
Texas Bankers Association  
Marketing Conference

### Building a Lasting Brand for Banks

Branding is more than just changing a few brochures or the look of a newsletter. Much more. A true comprehensive branding program will impact the entire organization. Your bank doesn't just "do" branding one year and mark it off its "to do" list: your bank must "live" the brand every day. This session provides practical information on what to do and not do with your bank's brand, including:

- Defining what branding really is
- Creating and leading an impactful brand culture
- Gaining staff buy-in
- Communicating your brand to your customers

### Top 10 Marketing Trends Every Bank Should Know

Wayne Gretzky, the great hockey player, once said "I skate to where the puck is going to be, not where it has been." It's the same thing with identifying marketing trends: as bank officials you need to know what the trends are going to be, not the ones that have worked well in the past decade. Marketing is changing. And your bank must change as well. This session examines trends including:

- Employing a digital strategy
- Staying relevant is key to sustainability
- Creating a unique user experience

*Note: This session can be modified for directors.*

### Emerging Technologies and Mobile Marketing

Biometric banking. Wearables. Videos. Digital payments. "Selfie" banking. Are these emerging technology marketing trends or just the latest fads that will fade away? As the marketing and technology fields merge, bank and 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

### Pearl Harbor or Pearl Jam: Marketing Across the Generations

Rotary phones. Touch-tone phones. Cell phones. Smart Phones. Each generation identifies itself with unique cultural images. Consumers active in today's marketplace are divided into five distinct groups: Matures, Baby Boomers, Xers, Millennials and Generation Z. Your willingness and adaptability as an aggressive marketer will determine how successful you are in reaching and bridging these critical age ranges. This session provides:

- An overview of Matures, Baby Boomers, Generation X, Millennial Generation and Generation Z
- Practical ways banks can market to each generation
- Financial products each generation finds appealing



## SALES AND STRATEGY

### TESTIMONIALS



*"...I definitely recommend sitting in on Mark Arnold sessions. For many years he's brought quite a bit of knowledge, expertise and education to the credit union movement."*

Mia Perez  
Chief Admin Officer  
Louisiana Federal CU



*"Taylor Wells...presented on the topic of 'Membership Growth Recipe'....Attendees appreciated his energy and the deep dive into things they can do to be relevant to different segments of their membership."*

Lynn Heider  
VP of PR & Communications  
Northwest CU Association



*"In our past planning sessions, we were... looking at budget and how we're doing. Now we focus on branding + technology = success... As we begin keeping that vision throughout everything we do, it's going to make us even more successful."*

Larry Seidl  
CEO, Smart Financial

### Who is the Member of the Future?

The customer of the future: the notion conjures images of self-driving cars and biometric banking. While tomorrow's customer will indeed use different tools, this person will possess their own unique sets of challenges and demands on the retail financial services environment. The customer of the future, with their individualized needs, is right around the corner. Are you ready for them? This session will cover how the customer of the future is:

- Technology obsessed
- Generationally unique
- Diverse demographically

### Developing the Ultimate Strategic Plan

Successful banks 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 bank does not settle for good, but strive for greatness. 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

### Customer Engagement: Service & Sales Solutions

Sales is not about pushing products to your customers. Rather true service and sales is about engaging with the customer. It is about providing solutions. Front-line employees—those that deal with customers every day—are critical in reaching your customers. But those key employees can't just randomly product push like a used car salesman. Instead they must employ service selling techniques: where service leads to sales. This session covers:

- Building relationships with customers
- The 8 basic service selling tips
- Practical ways to improve cross-selling efforts
- How to become a "solution provider" and not a pushy salesperson

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