



ON THE MARK STRATEGIES

LEADING, GUIDING AND BLAZING TRAILS FOR CREDIT UNIONS SUCCESS

KEYNOTE PRESENTATIONS



BRANDING AND MARKETING

- Building a Lasting Brand for Credit Unions
- Top 10 Marketing Trends Every Credit Union Should Know
- Emerging Technologies and Mobile Marketing
- Pearl Harbor or Pearl Jam: Marketing Across the Generations

STRATEGY AND SALES

- Who is the Member of the Future
- Developing the Ultimate Strategic Plan
- Member 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 credit union leader.

To book Mark Arnold or Taylor Wells call 214.538.4147 or e-mail Mark at 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 Credit Unions

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 credit union doesn't just "do" branding one year and mark it off its "to do" list: your credit union must "live" the brand every day. This session provides practical information on what to do and not do with your credit union's brand, including:

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

Top 10 Marketing Trends Every Credit Union 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 credit union 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 credit union 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, credit union and marketing executives must have a firm grasp on the latest technologies and how to best use them to reach their members. 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 credit unions 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 member of the future: the notion conjures images of self-driving cars and biometric banking. While tomorrow's member will indeed use different tools, this person will possess their own unique sets of challenges and demands on the retail financial services environment. The member of the future, with their individualized needs, is right around the corner. Are you ready for them? This session will cover how the member of the future is:

- Technology obsessed
- Generationally unique
- Diverse demographically

Developing the Ultimate Strategic Plan

Successful credit unions 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 credit union 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

Member Engagement: Service & Sales Solutions

Sales is not about pushing products to your members. Rather true service and sales is about engaging with the members. It is about providing solutions. Front-line employees—those that deal with members every day—are critical in reaching your members. 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 members
- The 8 basic service selling tips
- Practical ways to improve cross-selling efforts
- How to become a "solution provider" and not a pushy salesperson