2021 OBL Marketing Conference

MARKETING IN AN UPSIDE DOWN WORLD

Thursday & Friday, March 25 & 26 | Virtual Conference
8:30 a.m. – 12:30 p.m. Daily | Plus 1-hour "Lunch Discussion" on Day 1

Marketing in an Upside Down World

In 2020 it certainly felt like our world was turned upside down. Branches closed. Lending became risky. Few had money to invest. The economy was on life support and bankers became first responders. Traditional marketing strategies were put on hold and emergency communications were developed to save clients.

As bank marketers start to make sense of this chaotic world, it is apparent that there are many opportunities to provide greater assistance in local markets. During this virtual event, participants will gain new insights on how to leverage these opportunities by refining their marketing message and implementing new communication tactics.

This exciting program will be hosted by recognized OBL presenter Joe Micallef – who knows a thing or two about topsy turvy worlds. Originally from the land Down Under, Joe has developed a highly successful career helping financial institutions navigate turbulent terrains to produce exceptional results. He believes that a bank's ability to turn chaos into opportunity is largely reliant upon the great marketing messages and efforts an institution can manifest.

Attend this annual conference as Joe and other industry experts deliver another highly valuable virtual event that will help marketing teams achieve greater success in 2021.

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AGENDA

Day One – March 25

Welcome	8:30 – 8:40 a.m.
Session 1	8:40 – 9:30 a.m.
Break	9:30 – 9:40 a.m.
Session 2	9:40 – 10:30 a.m.
Break	10:30 – 10:40 a.m.
Session 3	10:40 – 11:30 a.m.
Break	11:30 – 11:40 a.m.
Session 4	11:40 a.m. – 12:30 p.m.
Open Discussion/ "Lunch" & Learn	12:30 – 1:30 p.m.

Day Two – March 26

Welcome Back	8:30 – 8:40 a.m.
Session 5	8:40 – 9:30 a.m.
Break	9:30 – 9:40 a.m.
Session 6	9:40 – 10:30 a.m.
Break	10:30 – 10:40 a.m.
Breakout Sessions	10:40 – 11:30 a.m.
Break	11:30 – 11:40 a.m.
Session 7	11:40 a.m. – 12:30 p.m.
Wrap-Up	12:30 p.m.

Who Should Attend

This annual conference is designed for marketing executives, other marketing team members and senior executives responsible for overseeing the marketing function, including CEOs, COOs, and select members of the board or strategic planning committee.

> **for those who think and hope things will basically go back to the way they were: stop. they won't**
>
> – McKinsey & Company

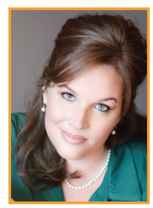
GENERAL SESSIONS – DAY 1 – MARCH 25

Opening Keynote/Session 1: Preparing for Marketing Success in a Post COVID-19 World

Joe Sullivan, CEO, Market Insights

The social and economic impact of the coronavirus pandemic is a jarring example of how one crisis, one new trend or one new technology can turn your marketing – and your financial institution – upside down. Only the creative, agile marketer will be able to help their institution stay competitive and connected. This session explores emerging consumer behaviors and marketing trends and sets out three ways to keep marketing less susceptible to emerging threats in the future. This session is designed to:

- Inspire innovative thinking and help bank marketers:
- Identify the consumer behaviors that have changed;
- Adjust their approach to marketing technology and messaging to align with new consumer behaviors; and
- Reimagine the role of marketing in the next normal.



Session 2: Audience Matters: Amplify Your Message with Smart Psychology

Greta Perel, PhD, Owner, Greta Perel LLC

Gaining your audience's attention is hard even in good times, never mind when long-term stress and strife make it doubly difficult to get your message across. So how can you hack psychology to supercharge your messaging? Discover exactly why it's so challenging to gain your audience's attention, what can be done to overcome these major challenges, and how you can instantly upgrade your messaging with office-ready tools and tricks. Participants can expect to leave with:

- An improved ability to motivate key audiences;
- Simple hacks for effective writing strategies; and
- Enhanced and improved communication skills across digital media.

Session 3: "Why Me?" – The Power of Personal Branding in a World of Competing Bank Brands

Joe Micallef, Sales Strategist & Coach, GrowUp Sales

Despite valiant efforts to differentiate your bank brands, the challenge is difficult as technological advances and largely homogenous product offerings continue to level out the playing field. Consumers and business owners have become more informed, however the key differentiator for many continues to be their personal relationship with their local banker. Therefore, one vital factor for growth continues to be how well bank officers are distinguishing their bank and personal brands to attract, develop and retain more customers. This has been particularly important over the past 12 months. Marketing managers play a critical role in helping bank and develop their brand so they can make a greater impression in their local market. At the conclusion of this session participants will learn the:

- Value in combining bank and personal brands
- Four key elements of personal branding: "Be it. Know it. Say it. Show it."
- Power of compelling stories and how they attract more customers

GENERAL SESSIONS – DAY 1 – MARCH 25

Session 4: How Strong Brands Stand the Test of Time

Amber Farley, Executive Vice President, Financial Marketing Solutions

Aware of it or not, every bank has a brand. And that brand is either because of you ... or in spite of you. Community bankers spend a lot of time managing the communications, products, events, marketing, technology, customer experience and delivery channels for the organization. While all of those are incredibly important, they are only elements, vehicles or platforms for something even greater. The long-term value of the bank will depend upon the value of the brand. Therefore, the ultimate goal should be to establish a unique brand for the organization, and to advance the brand through every internal and external effort of the entire organization. This session will focus on:

- What it means to manage the brand of your organization; and
- Why you should be passionate about doing so.

Open Discussion/"Lunch" & Learn

Grab your lunch and plan to join conference presenters for an opportunity to dive deeper into the topics on your mind. Breakout rooms will be available for targeted learning and discussion.

GENERAL SESSIONS – DAY 2 – MARCH 26

Session 5: Break Through: Save Time, Get Faster Responses by Writing for Action

Debra Jasper, Founder & CEO, Digital Mindset

Today's professionals receive 147 emails a day on average. Beyond a jam-packed inbox, they also struggle to keep pace with too many texts, too many Zoom meetings, and way too much to do. So how do you get your customers--and even your own colleagues--to slow down and tune into your marketing messages? This session will help attendees to:

- Design marketing messages, e-blasts, blogs, newsletters and other communications that break through the noise and capture attention;
- Save hours every week with SOS (short, organized and skimmable) content; and
- Get faster responses with clear calls to action; allowing marketers to
- Stop saying what you can't do--and start showing what you can!

GENERAL SESSIONS – DAY 2 – MARCH 26

Session 6: The 12-Month Social Content Accelerator

Dan Novalis, President & Owner, 2Novas

Deciding what content to produce can be one of the biggest hurdles to creating consistency for advertising and social media – yet this consistency is needed to build a personal or bank brand and to build core deposits and loan activity. This means many banks end up relying on generic "quirky holiday" type posts, which leave the bank undifferentiated from the competition. Get ready to roll up your sleeves and map out an entire year's worth of unique, differentiated content in this workshop. Attendees will leave with:

- An understanding of why consistency in their banks' digital presence is important for brand building, customer education and awareness;
- Ideas for incorporating more video and unique content to social posts;
- How to plan ahead, yet keep it flexible enough to adjust for current or unexpected events; and
- An entire map for the next 12-months of social media + advertising content.

Closing Keynote: Session 7: Five Tactical Tips to Enhance Your Social Media Efforts in 2021

Amber Farley, Executive Vice President, Financial Marketing Solutions

Not only is the world upside down – but the fast-changing world of social media marketing is spinning and swirling around us. COVID-19 had changed the way consumers bank, communicate, shop, socialize and more. Consequently, social networks are constantly stepping up their game to keep users informed, engaged and entertained. The bank's social strategy should be doing the same. Whether the bank is focused on becoming a trusted resource, communicating differently, humanizing the bank, highlighting community involvement, promoting bank products, developing business opportunities or extending your customer service offerings, this session will equip you to enhance your social media efforts and prepare for what is ahead in 2021. Key take-aways include:

- Learn how to become agile and better prepared for the unpredictable and develop an appropriate crisis management/communication plan.
- By combining customer data and behavioral economic best practices, banks can learn how to avoid being "tone deaf" in your bank's communication and content.
- The power of advancing your bank's brand resides with your people. Learn the importance of employee advocacy and social selling being a part of your overall social strategy.
- Consumers assume they can submit customer service inquiries on social media. Have a plan for how you will address these as they come.
- Be prepared to pay for social exposure. Learn how to develop social ad tactics that address privacy restrictions, audience inclusion and engaging creative formats.

BREAKOUT SESSIONS

Uncover the Power of Technology

Jim Caliendo, President & COO, PWCampbell

From greater engagement rates and improved brand continuity to enhanced customer education and increased sales, branch digital signage can be a powerful tool to have within a marketing arsenal. Learn how to effectively integrate leading technology such as video walls, iPads, indoor and outdoor displays, and interactive solutions within the retail branch network to improve overall customer experience and brand perception. The session will address:

- Why it is more important now than ever to incorporate technology into the branch;
- What types of technology banks are utilizing in their branches and what benefits they provide;
- How does technology bridge the gap between online and in-branch for Millennials and Gen Z;
- Key statistics supporting the use of technology in branches; and
- How technology effects the customer experience and brand perception.

Three Things Bank Marketing Leaders Need to Know About Customer Experience

Amy Baker, Chief Innovation Officer & Partner, SPRY

Many time customer experiences "just seem to happen" and banks are left wondering why customers do or fail to do what a bank wants or hopes they will do. In fact, customer experiences can and should be designed for optimal bank outcomes – but with the customer in the driver seat. Learn about customer experience design, how to incorporate best practices into marketing efforts and experience first-hand design thinking activities – even when the world is upside down! Participants will leave with:

- An understanding of design thinking and how that applies to bank customer experiences;
- Practical exercises to engage internal stakeholders and external customers in designing experiences; and
- Quick ways to measure customer experiences.

Banking Fast and Slow: Strategies for Any Economic Environment

Robb Rempel, Senior EVP - Client Services, Haberfeld

Haberfeld's founder, Ralph Haberfeld, explained that smart bankers "get rich slowly through hard work." At the same time, when banks align targeted, ROI-focused marketing with effective branch execution, they will start to see results immediately. Adding new profitable relationships is like buying annuities – over time they generate more and more value. And while the best time to begin acquiring more customers was last year, the next best time is right now! Explore the fast and slow approach to growing and increasing profitability through retail and business customer acquisition. Key topics include:

- The fast and slow approach to (and importance of) increasing retail and business customer acquisition;
- Why NOW is the right time to start growing new retail and business relationships;
- Identify methods to increase usage of your digital products; and
- Utilize data to understand how adding new, core customers has a rolling impact on profitability.

2021 OBL Marketing Forum

Learn more about the 2021 OBL Marketing Forum, an ongoing platform for marketing officers and staff to exchange ideas and seek solutions over a wide variety of timely topics and concepts. Membership includes this annual OBL Marketing Conference, as well as three seminars held on May 20 (virtually), August 26 and November 16.

Cancellation Policy

Refunds for the program will be granted for cancellations received in writing to education@ohiobankersleague.com by March 11, 2021. Cancellations will be subject to a $75 processing fee. No refunds or credits will be granted for cancellations received after March 11. Substitutions are always welcome.

Registration: OBL Bank Marketing Conference, March 25 & 26, 2021

THREE WAYS TO REGISTER

1. Visit ohiobankersleague.com and select Professional Development; Upcoming Programs; and Search by Date. Click the Blue Register button; Then log in or create a profile to complete online registration.
2. Complete this form and send it back to Susan Poling Jones at spoling@ohiobankersleague.com
3. Call 614-340.7595 for registration assistance.

In all instances, please note credit card or ACH payment will be required.

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