



SUNDAY, MARCH 11

9:00 a.m. – 7:30 p.m.
Grand Ballroom

CONFERENCE REGISTRATION

Refreshments during Registration
Sponsored by Kiosk & Display, Inc.

8:30 – 11:30 a.m.
Imperial B

PRE-CONFERENCE WORKSHOP 1

Get Spicy: Content Marketing for Credit Unions

Chris Brogan, CEO, Owner Media Group, Portland, ME

Most people's attempts at marketing and sales content is "mayonnaise on a saltine" bad. It's boring. Forgettable. You can do a lot better AND you don't have to pay some massive film crew and a team of 20 to make great video, audio and text content. How can you deliver material that people will actually want to see, and what can you do to make it sell better for you?

You'll learn:

- How to build from the seed of an idea into several different "perfect bites" of text, audio, video, photos, and more.
- Build a simple editorial calendar designed for people who have real jobs and a lot to do.
- Learn the simple technology required to make this all real. If you can use your phone, you're smart enough.

Join business advisor and New York Times bestselling author Chris Brogan for a lively workshop that will send you away with actionable steps to implement these ideas into your workplace.

8:30 – 11:30 a.m.
Imperial A

PRE-CONFERENCE WORKSHOP 2

Team Behind the Team Tour

Sponsored by Mills Marketing

Have you ever wondered what it takes to run a Major League baseball team? What happens behind the scenes to guarantee both a smooth operation and a great customer experience? You'll take an insider tour of the San Francisco Giants Baseball organization then have a chance to ask questions of your own. Just like you, they face the challenge of competing in a crowded marketplace. Learn how they differentiate their team while competing for the consumer's dollar.

1:00 – 3:00 p.m.
Franciscan Room

COMMUNITY GIVEBACK

In one of the most expensive housing markets in the nation, the East Oakland Community Housing Project, a nonprofit organization in Oakland California, is finding solutions for men, single moms, and families. Their clients receive assistance with finding permanent housing, career and employment assistance, job training support and other services designed to help them gain independence. Through Patelco Credit Union in the Bay Area, they are also receiving invaluable financial education training and resources specifically help with developing a household budget and tips on building good credit. Through assistance from Patelco transitioning families are better equipped for self-sufficiency and permanent housing. In the most recent completed program year (October 2016-September 2017) for Matilda Cleveland, a transitional housing program for single parents with children which is one of several programs, 44 out of 50 clients (88%) transitioned to permanent housing. Thanks to Patelco many of these individuals were prepared to deal with their finances a lot better than they were prior to coming to the program.

You will help to build care packages so the East Oakland Community Housing Project's clients can take their next steps. Be part of the credit union "people helping people" philosophy in action.

3:15 – 4:00 p.m.
Imperial B

FIRST-TIME ATTENDEE ORIENTATION

If you've never attended this conference before, plan on joining us at the first-time orientation. We'll provide a quick rundown of conference events and leave plenty of time for you to start networking with other attendees.

4:15 – 4:30 p.m.
Continental Ballroom

OPENING CEREMONIES

Emcee Extraordinaire – Patrick Adams, President/CEO, St. Louis Community CU, St. Louis, MO

4:30 – 5:30 p.m.
Continental Ballroom

KEYNOTE ADDRESS

Authenticity Above All Else

Sponsored by Intuvo

Tony Hawk, Skateboarding Legend, Entrepreneur, Philanthropist

In the world of skateboarding, nothing is held in higher esteem than authenticity. So, how does the sport's most famous face walk the fine line between authenticity and "selling out?" Legendary skateboarder Tony Hawk walks the walk every day as he continues to be the face of the sport he loves, while managing his successful business empire and award winning charitable foundation.

5:30 - 7:30 p.m.
Grand Ballroom

WELCOME RECEPTION – Meet your Sponsors

Co-sponsored by Harland Clarke and CUNA Strategic Services and SPC/Convergint Technologies

Join us for the opening welcome reception directly following our keynote speaker, Tony Hawk. This is a great time to meet up with old friends and make some new ones. Our sponsors will also be on hand showcasing their latest products. There will be plenty of food and beverage available.

MONDAY, MARCH 12

7:00 a.m. – 4:30 p.m.
Grand Ballroom

WELCOME CENTER

Conference Registration

Sponsor Area

Charging Stations – *Sponsored by Palmer Ad Agency and Raddon™, a Fiserv company*

Diamond Award Kiosks – *Sponsored by AdQue® Digital Display Systems*

7:00 - 8:00 a.m.
Grand Ballroom

BREAKFAST – Visit with Sponsors

Co-sponsored by 360 View and Leadfusion

8:00 – 9:45 a.m.
Continental Ballroom

GENERAL SESSION

CU Awareness Initiative Update

Sponsored by Banzai

Douglas Kiker, Chief Strategic Communications Officer, Credit Union National Association, Washington, DC

Michelle Hunter, SVP Marketing & Development, Credit Union of Southern California, Anaheim, CA

Graeme Trayner, Managing Director, The Glover Park Group, Washington, DC

Douglas, Michelle, and Graeme from CUNA's Creating Awareness Initiative Advisory Group will provide an update on how the movement can bring the newly-launched Credit Union Brand Platform to life. This will include how marketing and business development leaders can utilize the tools, creative content, messaging and research developed over the last 18 months to truly move the needle nationwide when it comes to consumer awareness of and affinity for credit unions as their best financial partner.

9:45 – 10:15 a.m.
Grand Ballroom

NETWORKING BREAK – Visit with Sponsors

Sponsored by Diamond Communication Solutions

10:15 – 10:30 a.m.

Pass Time to Breakout Sessions

10:30 - 11:30 a.m.
Imperial A

BREAKOUT SESSIONS

Hugging Social Media Haters, the CU Way (session does not repeat)

Sponsored by Callahan & Associates and CUBrandMonitor

Andrea Parrish, Digital Marketing Specialist, STCU, Liberty Lake, WA

With the CFPB regulations that requires complaint process compliance, the deep impacts of online conversations, and the constant questions about how to deal with the two-way communications of social media, online reputation management is no longer an option.

The negative feedback that scares a lot of people about social can actually be one of the best parts, and this presentation will be a practical overview of the strategies, philosophies, and day-to-day action plan behind a great, proactive, and beneficial social media presence.

Imperial B

Driving Membership with Digital Marketing (session repeats)

Sponsored by ChannelNet

Peter Platt, President, Accountable Digital, LLC, Rochester, NY
Your web site and mobile app are your two busiest branches. In this session we'll look at case studies of digital marketing campaigns that not only drove awareness, but actually drove member acquisition and loan volume.

Using the right mix of online ads, social media and search enhances your positioning in the community and helps build interest among your most important audiences in your market.

Plaza B

Master Authentic Communication through Behavioral Insight and Maximize your BD Results (session repeats)

Sponsored by BowStern Marketing Communications

Carletta Clyatt, Vice President, The Omnia Group, Inc., Tampa, FL
Communication is fundamental to the operation of any credit union. Knowing your natural communication style and behavioral tendencies allows you to more effectively recognize the differences within yourself and the people you are communicating with. Learn more about who you are, your strengths, challenges, and personality traits. We'll discuss how you communicate, and how to "handle" different types of personalities. This is the foundation for Authentic Communication, making it easy to build trust and lay the foundation for successful engagement.

What You'll Learn: What is authentic communication? The components of authentic communication. How understanding behavior can improve your communication skills. 5 Quick and effective tips to improve your communication style.

Plaza A

Stand O.U.T at Events (session repeats)

Sponsored by Rothschild Marketing Group

Spencer Carver, AVP SEG Development Mountain America CU, West Jordan, UT

Business Development employees focus on creating sustainable growth opportunities for their respective credit unions. One channel of growth is through events. But how do you STAND OUT without literally costing your credit union an arm and a leg? Learn how to maximize your time and build your ROI through your events.

11:30 – 11:45 a.m.

Pass Time to Breakout Sessions

11:45 a.m. – 12:45 p.m.

Imperial A

BREAKOUT SESSIONS

What's the Truth Behind the Data? (session does not repeat)

Sponsored by Raoust+Partners

Juli Anne Lawrence, Chief Strategic Officer, Raoust+Partners, Hampton, VA

Olivier Raoust, Chief Brand Strategist/Chief Creative Director, Raoust+Partners, Hampton, VA

The Echo Project™ – Using Member Feedback Loops to mine the information you really want. Accelerating shifts in consumer options, preferences and anxieties are causing problems for credit unions that aren't keeping up. Those that can grasp the opportunity by shaping and reshaping their strategies based on the voice of the consumer will thrive and move forward. The Echo Project™ is a new method of engaging with members to gather insightful data based on purchasing and delivery channel preferences. The process is leading to breakthroughs in establishing successful market segmentation and

communication strategies that meet the emerging needs of consumers and small businesses – thus helping you achieve your objectives by meeting your members’ ever-changing needs.

Imperial B

Driving Membership with Digital Marketing

Sponsored by Americaneagle.com

Peter Platt, President, Accountable Digital, LLC, Rochester, NY
Your web site and mobile app are your two busiest branches. In this session we'll look at case studies of digital marketing campaigns that not only drove awareness, but actually drove member acquisition and loan volume.

Using the right mix of online ads, social media and search enhances your positioning in the community and helps build interest among your most important audiences in your market.

Plaza B

Master Authentic Communication through Behavioral Insight and Maximize your BD Results

Sponsored by SiriusXM

Carletta Clyatt, Vice President, The Omnia Group, Inc., Tampa, FL
Communication is fundamental to the operation of any credit union. Knowing your natural communication style and behavioral tendencies allows you to more effectively recognize the differences within yourself and the people you are communicating with. Learn more about who you are, your strengths, challenges, and personality traits. We'll discuss how you communicate, and how to "handle" different types of personalities. This is the foundation for Authentic Communication, making it easy to build trust and lay the foundation for successful engagement.

What You'll Learn: What is authentic communication? The components of authentic communication. How understanding behavior can improve your communication skills. 5 Quick and effective tips to improve your communication style.

Plaza A

Stand O.U.T at Events

Sponsored by National Credit Union Foundation and Biz Kid\$

Spencer Carver, AVP SEG Development Mountain America CU, West Jordan, UT

Business Development employees focus on creating sustainable growth opportunities for their respective credit unions. One channel of growth is through events. But how do you STAND OUT without literally costing your credit union an arm and a leg? Learn how to maximize your time and build your ROI through your events.

12:45 – 1:45 p.m.
Continental Ballroom

MEMBERSHIP LUNCHEON – Open to all attendees and sponsors

1:45 – 2:00 p.m.

Pass Time to Breakout Sessions

2:00 – 3:00 p.m.
Imperial A

BREAKOUT SESSIONS (all sessions repeat)

Marketing to Millennials Online

Sponsored by Digital Solutions

Chris Leone, President, WebStrategies, Inc., Midlothian, VA
Credit unions with aging membership bases understand millennials are the key to long term survival. But marketing to millennials in the age of digital and mobile technology requires a more significant shift in how and where we target. Effectively reaching millennials online means ditching traditional banner

ads and pre-roll videos and taking a more "platform-focused" approach.

In this session, Chris will break down the online behaviors of millennials, where and how they spend their time, the different methods of targeting online, and the type of campaigns needed to win their attention.

Imperial B

Disaster Preparation – A Communications Guide to Mitigate a Crisis

Sponsored by BALANCE

Amy McGraw, VP Marketing, Tropical Financial CU, Miramar, FL
Katelyn McManamon, Marketing & BD Manager, Penn East FCU, Scranton, PA

Jeanne Pickens, COO, Rogue CU, Medford, OR

Moderator: Casey Boggs, President, Merit, Portland, OR

Credit unions need to create or dust off and practice their crisis communications and disaster recovery plans, and practice executing them. In the past year alone, we've seen examples of how natural disasters, security breaches, or public relations crisis can put your plans to the test. This breakout session will send you back to your credit union with tangible take-aways and best practices.

Plaza B

Expand your Marketing and BD Capacity: Connect People, Process, Promotion and Profitability

Sponsored by IMN

Joni Walker, Senior Consultant, Cascadia Business Development, Missoula, MT

In this high energy, interactive session, you will explore the strategic connection between your people, processes, promotions and profitability. Applying effective, efficient practices to marketing and business development is critical in today's competitive and often unforgiving environment.

In this session, you will examine your current practices and then determine how to overcome barriers, streamline marketing and business development operations and develop effective processes to increase your individual, team and organizational capacity to perform at even higher levels. You will take home tools, resources and skills to immediately increase your impact within your credit union and your market.

Plaza A

Business Development – Metrics that Matter

Julie Ferguson, Owner, JRF Consulting Services, LLC, Portland, OR

In our data driven world, building brand awareness and sharing our credit union story isn't enough. We need data. Really big, really powerful data. The ultimate metric is to track sales, but we all know that can be tricky. Join Julie as she shares how credit unions around the country are using metrics to boost business development and their organization's bottom line.

3:00 – 3:30 p.m.
Grand Ballroom

NETWORKING BREAK – Visit with Sponsors

Sponsored by Codigo

3:30 – 3:45 p.m.

Pass Time to Breakout Sessions

3:45 – 4:45 p.m.

Imperial A

BREAKOUT SESSIONS

Marketing to Millennials Online

Sponsored by EPICOSITY

Chris Leone, President, WebStrategies, Inc., Midlothian, VA
Credit unions with aging membership bases understand millennials are the key to long term survival. But marketing to millennials in the age of digital and mobile technology requires a more significant shift in how and where we target. Effectively reaching millennials online means ditching traditional banner ads and pre-roll videos and taking a more "platform-focused" approach.

In this session, Chris will break down the online behaviors of millennials, where and how they spend their time, the different methods of targeting online, and the type of campaigns needed to win their attention.

Imperial B

Disaster Preparation – A Communications Guide to Mitigate a Crisis

Sponsored by MDG Advertising

Amy McGraw, VP Marketing, Tropical Financial CU, Miramar, FL
Katelyn McManamon, Marketing & BD Manager, Penn East FCU, Scranton, PA

Jeanne Pickens, COO, Rogue CU, Medford, OR

Moderator: Casey Boggs, President, Merit, Portland, OR

Credit unions need to create or dust off and practice their crisis communications and disaster recovery plans, and practice executing them. In the past year alone, we've seen examples of how natural disasters, security breaches, or public relations crisis can put your plans to the test. This breakout session will send you back to your credit union with tangible take-aways and best practices.

Plaza B

Expand your Marketing and BD Capacity: Connect People, Process, Promotion and Profitability

Sponsored by High Cotton USA

Joni Walker, Senior Consultant, Cascadia Business Development, Missoula, MT

In this high energy, interactive session, you will explore the strategic connection between your people, processes, promotions and profitability. Applying effective, efficient practices to marketing and business development is critical in today's competitive and often unforgiving environment.

In this session, you will examine your current practices and then determine how to overcome barriers, streamline marketing and business development operations and develop effective processes to increase your individual, team and organizational capacity to perform at even higher levels. You will take home tools, resources and skills to immediately increase your impact within your credit union and your market.

Plaza A

Business Development – Metrics that Matter

Julie Ferguson, owner, JRF Consulting Services, LLC, Portland, OR

In our data driven world, building brand awareness and sharing our credit union story isn't enough. We need data. Really big, really powerful data. The ultimate metric is to track sales, but we all know that can be tricky. Join Julie as she shares how credit unions around the country are using metrics to boost business development and their organization's bottom line.

Evening

On your Own

TUESDAY, MARCH 13

7:00 a.m. – 3:00 p.m.
Grand Ballroom

WELCOME CENTER

Conference Registration

Sponsor Area

Charging Stations – *Sponsored by Palmer Ad Agency and Raddon™, a Fiserv company*

Diamond Award Kiosks – *Sponsored by AdQue® Digital Display Systems*

7:00 - 8:00 a.m.
Grand Ballroom

BREAKFAST – Visit with Sponsors

Co-Sponsored by LightStream and Mogo Interactive

8:00 – 8:15 a.m.

MORNING ANNOUNCEMENTS

8:15 – 9:15 a.m.
Continental Ballroom

GENERAL SESSION

Tech Talks

Sponsored by CUNA Digital Marketing School

James Robert Lay, CEO, Digital Growth Institute, Houston, TX
Madhukar Kumar, VP Product Strategy, CX, Oracle, Redwood Shores, CA

Tina Rozul, Senior Manager Product Marketing, Salesforce, San Francisco, CA

Moderator: Patrick Adams, President/CEO, St. Louis Community CU, St. Louis, MO

Pull up a chair next to our panel of TECHxperts as they share insights on the impact of marketing technology in the financial industry. You'll learn how organizations can effectively integrate marketing technologies into their marketing strategy and operations. They will discuss what's hot in digital payments, marketing automation, and how to thrive in the age of digitally-empowered consumers.

9:15 – 9:30 a.m.

Pass Time to Breakout Sessions

9:30 – 10:30 a.m.
Imperial A

BREAKOUT SESSIONS

Supercharge your Digital Marketing Strategy with Integrated Offline Tactics (session does not repeat)

Sponsored by Westamerica Communications

Phil Lockwood, Founder, Creation Chamber, Denver, CO

Danella Soeka, Director of Client Strategy, Creation Chamber, Denver, CO

Too many credit unions still treat their digital and traditional marketing efforts as silos, but the real potential is in unique combinations of both! In this session, we'll cover the benefits of a fully-integrated strategy, and provide three case studies of underutilized and transformative real-world applications. These are things that truly move the needle.

Plaza A

Creating Qualified Borrowers through Financial Education and Outreach (session repeats)

Sponsored by National Credit Union Foundation and Biz Kid\$

Jessica Oliver, Director of Financial Outreach, Pelican State CU, Baton Rouge, LA

Are you declining loans to loyal, long-time members due to low credit scores, slow payments and other financial issues? Learn how financial education, outreach and getting the whole story creates qualified borrowers and stronger member relationships.

Plaza B

Cultural Alignment to Your Brand's Strategy (session repeats)

Sponsored by Synergent

Steve Ducey, Chief Experience officer, Vibrant CU, Moline, IL
Branding goes beyond logos, storyboards, fonts and fun colors. In this session learn the importance of cultivating Happy Health People and how this permeates through your brands personality.

Imperial B

SEG vs Community Based CU Panel (session repeats)

Sponsored by Sourcelink

Julie Monahan, Business Development Officer, First Heritage FCU, Painted Post, NY

Jeremiah DeGollon, AVP Business Development, Summit CU, Madison, WI

Royce Ngiam, VP, Marketing, Partners FCU, Burbank, CA

Come hear from Credit Union Business Development professionals on what works for them. How they manage their SEG relationships and how they go about getting business out of their community. This session will allow questions from the audience as we work to discover some new tools you can bring back to your credit union whether your credit union is SEG based or community chartered.

10:30 – 11:00 a.m.
Grand Ballroom

NETWORKING BREAK – Visit with Sponsors

Sponsored by The Money Mammals

11:00 a.m. – Noon
Imperial A

BREAKOUT SESSIONS

What Matters Now™: Insights from Multicultural Consumers
(session does not repeat)

Eric Hansing, VP Multicultural Strategy & Market Development, CUNA Mutual Group, Madison, WI

Opal Tomashevskya, Manager Multicultural Business Strategy, CUNA Mutual Group, Madison, WI

Kirby Wenger, Vice President, Direct Marketing & Media for TruStage, CUNA Mutual Group, Madison, WI

How well do you know what matters to multicultural consumers?

Understanding the unique values and experiences of multicultural consumers helps credit unions make closer connections to better serve this growing segment of the population.

Why is it so important to know what matters to multicultural consumers?

With continually expansive buying power, multicultural consumers have emerged as the #1 consumer force in this country. Over the last 5 years, multicultural consumers have accounted for 100% of the U.S. population growth and 61% of the credit union growth*. By 2021 multicultural consumers will account for 100% of the U.S. consumer growth**.

Join us for an in-depth look at the unique makeup and preferences of today's multicultural consumers, how these cultural differences impact business performance, and ways credit unions can reach and establish more meaningful relationships with this core consumer group.

*The Collage Group, Latinum Network: Understanding Financial Needs and Habits of Underserved Customers, 2017

** TruStage member data with Acxiom overlay data on race and ethnicity, 2017

Plaza A

Creating Qualified Borrowers through Financial Education and Outreach

Sponsored by EverFi

Jessica Oliver, Director of Financial Outreach, Pelican State CU, Baton Rouge, LA

Are you declining loans to loyal, long-time members due to low credit scores, slow payments and other financial issues? Learn how financial education, outreach and getting the whole story creates qualified borrowers and stronger member relationships.

Plaza B

Cultural Alignment to Your Brand's Strategy

Steve Ducey, Chief Experience officer, Vibrant CU, Moline, IL

Branding goes beyond logos, storyboards, fonts and fun colors. In this session learn the importance of cultivating Happy Health People and how this permeates through your brands personality.

Imperial B

SEG vs Community Based CU Panel

Sponsored by Bluespire Marketing

Julie Monahan, Business Development Officer, First Heritage FCU, Painted Post, NY

Jeremiah DeGollon, AVP Business Development, Summit CU, Madison, WI

Royce Ngiam, VP, Marketing, Partners FCU, Burbank, CA

Come hear from Credit Union Business Development professionals on what works for them. How they manage their SEG relationships and how they go about getting business out of their community. This session will allow questions from the audience as we work to discover some new tools you can bring back to your credit union whether your credit union is SEG based or community chartered.

Noon – 1:00 p.m.

Continental Ballroom

NETWORKING LUNCH - BONUS SESSION

ADA Lawsuits: What Every Marketer Needs to Know

Michelle Anderson, Partner, Fisher Phillips, New Orleans, LA

With hundreds of lawsuits brought against credit unions for non-compliant ADA websites, ADA compliance is quickly becoming a top concern across the country. Find out what you need to do now to avoid potential litigation in the future.

1:00 – 1:15 p.m.

Pass Time to Breakout Sessions

1:15 – 2:15 p.m.

Imperial A

BREAKOUT SESSIONS (all sessions repeat)

7 Seconds to Impact: Building a Disruptive Brand for Growth and Profitability

Randy Schultz, VP Marketing, Weber Marketing Group, Seattle, WA

7 seconds to impact. Building a disruptive brand for growth and profitability. How do we reach the audiences we're after the way they want to be reached versus how we think they should be reached? To build a journey-centric approach to a disruptive brand that also yields a roadmap to campaigns that blend out, you must look past identifying only channels. To be successful your

efforts should be channel-agnostic – integrating an array of internal processes. Yes, your CRM, HR, IT and marketing must all be involved.

A look at successful disruptive brands & campaigns – and how to make yours one of them. A fast-paced, interactive session that will challenge the “the way it’s always been done.” If you’re looking for a fresh approach...you’ll find it here! Breaking down departmental silo’s – why bother? The importance of buy in & culture integration to your success. Brand Assessment vs Business Model Alignment – what’s the dif? “How do I implement this at my credit union?”

Plaza A

Stand Out: Influencing Member Experience in a Crowded Marketplace

Sponsored by IQ Agency

Deborah Mersino, Chief Marketing Officer, Oregon Community CU, Eugene, OR

Deborah Mersino, Chief Marketing Officer at OCCU, will provide 8 Tips to Differentiate Your Financial Institution through CX and explain why it’s critical to clarify leadership roles around CX, establish your vision and harness the 6 competencies required for CX Transformation to be competitive in today’s marketplace. Come to this lively session chock full of examples, research and insights. You’ll walk away with a roadmap for taking CX to the next level at your organization. Not only will you better understand why so many financial institutions fail to gain traction, deliver on projects and/or truly differentiate, but you will know what you need to do to step up, lead and compete in the one area that 75% of companies last year claimed was their number one priority – improving customer experiences.

Plaza B

Consumers Are Weird: How Irrational Behavior Impacts Your Membership Growth

Sponsored by Bluespire Marketing

Melina Palmer, Founder, Defying Gravity, Tumwater, WA

People are not logical. So why does your credit union build product positioning, marketing, and business development conversations around logic? Fortunately, these irrational behaviors are very predictable when you know what to look for. Melina shares relatable examples using concepts from Behavioral Economics, including: loss aversion, anchoring & adjustment, availability and relativity. And, provides simple tips anyone can start applying right away to have immediate impact on getting members to come on board at their credit union.

Imperial B

Flashback to 1993: What Have We Learned in the Past 25 Years

Hilary Reed, Chief Strategy Officer, Empower Strategic Solutions, Yardley, PA

Before the days of the “over-informed,” digital consumer there were brand-loyal consumers who had blind trust in the product and the company. Fast forward to 2018, our target audiences are glued to technology and armed with information before setting foot in the door. We’ll take a look back through the years and see what we can learn from various marketing practices over the last 25 years.

2:15 – 2:45 p.m.
Grand Ballroom

NETWORKING BREAK – Sponsor Drawings

2:45 – 3:45 p.m.
Imperial A

BREAKOUT SESSIONS

7 Seconds to Impact: Building a Disruptive Brand for Growth and Profitability

Randy Schultz, VP Marketing, Weber Marketing Group, Seattle, WA

7 seconds to impact. Building a disruptive brand for growth and profitability. How do we reach the audiences we're after the way they want to be reached versus how we think they should be reached? To build a journey-centric approach to a disruptive brand that also yields a roadmap to campaigns that blend out, you must look past identifying only channels. To be successful your efforts should be channel-agnostic – integrating an array of internal processes. Yes, your CRM, HR, IT and marketing must all be involved.

A look at successful disruptive brands & campaigns – and how to make yours one of them. A fast-paced, interactive session that will challenge the “the way it’s always been done.” If you’re looking for a fresh approach...you’ll find it here! Breaking down departmental silo’s – why bother? The importance of buy in & culture integration to your success. Brand Assessment vs Business Model Alignment – what’s the dif? “How do I implement this at my credit union?”

Plaza A

Stand Out: Influencing Member Experience in a Crowded Marketplace

Sponsored by Weber Marketing Group

Deborah Mersino, Chief Marketing Officer, Oregon Community CU, Eugene, OR

Deborah Mersino, Chief Marketing Officer at OCCU, will provide 8 Tips to Differentiate Your Financial Institution through CX and explain why it’s critical to clarify leadership roles around CX, establish your vision and harness the 6 competencies required for CX Transformation to be competitive in today’s marketplace. Come to this lively session chock full of examples, research and insights. You’ll walk away with a roadmap for taking CX to the next level at your organization. Not only will you better understand why so many financial institutions fail to gain traction, deliver on projects and/or truly differentiate, but you will know what you need to do to step up, lead and compete in the one area that 75% of companies last year claimed was their number one priority – improving customer experiences.

Plaza B

Consumers Are Weird: How Irrational Behavior Impacts Your Membership Growth

Melina Palmer, Founder, Defying Gravity, Tumwater, WA

People are not logical. So why does your credit union build product positioning, marketing, and business development conversations around logic? Fortunately, these irrational behaviors are very predictable when you know what to look for. Melina shares relatable examples using concepts from Behavioral Economics, including: loss aversion, anchoring & adjustment, availability and relativity. And, provides simple tips anyone can start applying right away to have immediate impact on getting members to come on board at their credit union.

Imperial B

Flashback to 1993: What Have We Learned in the Past 25 Years

Hilary Reed, Chief Strategy Officer, Empower Strategic Solutions, Yardley, PA

Before the days of the “over-informed,” digital consumer there were brand-loyal consumers who had blind trust in the product and the company. Fast forward to 2018, our target audiences are glued to technology and armed with information before setting foot in the door. We’ll take a look back through the years and see what we can learn from various marketing practices over the last

25 years.

5:00 – 5:45 p.m.
Continental Foyer

COCKTAIL RECEPTION
Sponsored by image.works

5:45 – 9:00 p.m.
Continental Ballroom

RECOGNITION DINNER & AWARDS
Co-Sponsored by Adrenaline, CU Direct and Social Assurance
Volunteer of the Year, Excellence Awards, Rising Star, Marketing Professional of the Year, Business Development Professional of the Year, Lifetime Achievement, and Diamond Award winners will be announced.

WEDNESDAY, MARCH 14

8:00 - 8:45 a.m.
Continental Ballroom

BREAKFAST

8:45 – 9:00 a.m.
Continental Ballroom

COMMUNITY GIVEBACK
Join us as we make our final presentation to the East Oakland Community Housing Project.

9:00 – 10:00 a.m.
Continental Ballroom

CLOSING SESSION
The Irresistible Power of Strategic Storytelling
Sponsored by Third Degree Advertising
Kindra Hall, Phoenix, AZ

The shift from a transactional economy to a connected one has people scrambling; when surveyed, companies admit they believe a substantial portion of their revenue is under threat as a result. Businesses, brands, sales forces, marketing teams and leaders at all levels are desperately trying to capture attention and resonate with consumers who expect more. Is there a secret weapon? A silver bullet to humanize and connect? Yes. The answer is strategic storytelling.

The problem? In its rapid rise in popularity, “storytelling” has been reduced to unactionable jargon. Everyday businesses and individuals miss critical opportunities to connect with their elusive audiences in powerful and profitable ways because they lack a storytelling skill. Until now.

Kindra has presented this storytelling keynote for audiences around the world and across industries to equip them with this essential skill for success in a connected economy. Far from jargon or fluff, Kindra’s approach to storytelling is razor-sharp and immediately actionable. The result: Using Kindra’s blueprint for effective storytelling, attendees leave empowered and equipped to close more sales, build better relationships, or blow up their brands by leveraging the irresistible power of their stories.

10:00 a.m.

Bringing It All Together
Patrick Adams, President/CEO, St. Louis Community CU, St. Louis, MO