

WBA Marketing Conference

March 21, 2017

Agenda

8:30 – 9:00 am **Registration and Continental Breakfast**

9:00 – 10:15 am **Welcome**

Liz Wilson, Executive Vice President, Washington Bankers Association, Seattle, WA

David Devine, Senior Vice President, Marketing Director, Columbia Bank, Tacoma, WA; Marketing Committee Chairman, Moderator

The Rise of the Bots: Relationship Banking in the Age of Unbundling

Neff Hudson, Vice President, Corporate Development, USAA, San Antonio, TX

The financial services industry has been hit with three huge distribution changes in less than 20 years. First, there was the need to deliver products and services via web sites, then from smartphones and now from secure messaging channels like Facebook Messenger and voice-based assistants like Alexa.

It's tempting to view tech companies and startups as competitors or threats. But it's more important to view them as leading indicators about what customers need from banks now – and how their expectations are being set from outside the industry.

Banks can (continue to) compete successfully by leveraging the trust in our brands and the (relatively) low cost of digital development to create personalized banking experiences to enhance the customer experience. This presentation will provide timely examples of how to create digital experiences that create trust – even when they occur outside of a traditional bank platform.

10:15 – 10:30 am **Coffee Break**

Sponsored by Kaye-Smith

10:30 – 11:15 am **ADA Website Compliance**

Merrit Jones, Attorney, Bryan Cave LLP, San Francisco, CA

Banks have been among the most recent targets of demand letters and lawsuits alleging inaccessible websites in violation of the Americans With Disabilities Act, despite the fact that the ADA and its regulations do not currently address websites. Long-awaited guidance from the Department of Justice has been delayed until at least 2018. In the interim, banks can reduce their potential liability as well as enhance their services and marketing by making their websites more accessible to disabled users. Attorney Merrit Jones of Bryan Cave LLP will explain the current industry standards for website accessibility, and steps your bank can take to improve accessibility, reduce risk, and enhance services and marketing to these customers.

11:15 – 12:15 pm

Aligning Data Analytics and Strategy to Transform Branch Experiences, Brand Performance & Prototype Modeling

Mark Weber, CEO, Weber Marketing Group, Seattle, WA

In a dynamically shifting market, your corporate strategic branch initiatives must be fully linked to your future channel evolution, market growth strategy, internal culture and brand experiences. But how often does the process start with data analytics, local market analysis, lifestyle segment differences and future-focused strategies to first define a 2021 Growth Road Map right for your market?

In the first part of this session, you'll learn how banks can define their future segmentation targets and develop highly targeted 2021 Branch Network Plans using powerful data analytics and market scoring methods to reduce ineffective branches and target ideal growth opportunities.

Once your branch business objectives and market growth strategy are aligned, you're ready to "reimagine banking and design a new "2021 Branch Prototype Business Model," supported by new technologies, brand and cultural initiatives and profitable products to drive new experiences and higher performance. We'll share a best practice collaborative team process using bank case studies on how to realign and redesign your operations, processes, staffing model, branding and touch points to simplify and boost user brand experiences — and find competitive advantage.

12:15 – 1:30 pm

Networking Lunch

1:30 – 2:30 pm

What's Next for Mobile Banking? Understanding Today's Digital Battlefield

Dave DeFazio, Partner, StrategyCorps, Nashville, TN

The question is simple, but the answers are constantly evolving. Today's consumers have never been more addicted to their phones, impacting how the best retailers have adjusted their strategies to capitalize on this phenomenon. Disruptive technologies pose a great challenge to today's banking industry. Understanding this changing landscape is critical to keeping a level playing field against powerful and nimble competitors.

Discover the newest mobile banking features that are being implemented by top performing financial institutions that go beyond basic transactions and help them connect better with their customers. In this session, Dave DeFazio will look at the most recent mobile payment trends that are being driven by non-bank retailers and learn how the banking industry is responding. This will be an entertaining and interactive session with mobile app demonstrations, customer research videos and industry case studies.

2:30 – 2:45 pm

Coffee Break

Sponsored by Kadince

2:45 – 3:30 pm

Panel: What Can Institutions with Limited Budgets Do to Utilize Digital Marketing?

David Devine, Senior Vice President, Marketing Director, Columbia Bank, Tacoma, WA; Marketing Committee Chairman, Moderator
Dave DeFazio, Partner, StrategyCorps, Nashville, TN
Steven Ramirez, CEO, Beyond the Arc, San Francisco, CA

Utilizing the newest marketing trends can quickly become a costly affair, and it is not necessarily achievable for banks of all sizes. In this session, the panel will explore what ideas and tools banks with any size marketing budget will be able to use.

3:30 – 4:30 pm

Strategic Premise: Customer Experience

Steven Ramirez, CEO, Beyond the Arc, San Francisco, CA

We're in the Age of the Customer, an economic wave in which consumers have an unprecedented level of choice, and power, in the marketplace. They have the ability to demand products and services that are precisely tailored to their needs. And customer experience has become the primary battleground for differentiation in a range of industries, including retail banking, mortgage lending, and wealth management.

For marketers, operating in the Age of the Customer means that data-driven segmentation, predictive analytics, and marketing automation are the new keys to success. With the (r)evolution in social media, word of mouth travels faster than ever. It amplifies the impact of marketing blunders—and marketing brilliance. Effective use of social media has become an essential tool for banks to deepen their customer relationships and grow brand loyalty. It puts customers in the driver's seat.

- What are common business objectives for social media marketing?
- How can they be achieved?
- What tools or platforms can support your social media strategy?

4:30 pm

Adjourn