

2017 Marketing Conference

Program: March 21, 2017

Location:

Cedarbrook Lodge
18525 26th Avenue S.
SeaTac, WA 98188

Reservations: (206) 901-9268
www.cedarbrooklodge.com (use code WBA)

FEES: Before 3/7 After 3/7

WBA Member*:	\$395	\$445
Non-Members:	\$750	\$850

Send two registrants and the third is free!

**Attendance at WBA programs is limited to employees, officers and directors of WBA members, non-members eligible for membership in the WBA and members of other state banking associations which grant reciprocal privileges to WBA members.*

Cancellation Policy: Registrations may be cancelled up to seven days prior to the conference. All cancellations have a \$50 charge. No cancellations within the seven day period will be accepted; however, a substitute may attend.

Registration Form

Please complete the following information:

Name _____
Bank/Firm _____
Work Address _____
City/State/Zip _____
Phone _____
Title _____
Email _____

Register: www.wabankers.com
registration@wabankers.com

For more information:

Mail: 1601 Fifth Avenue, Suite 2150, Seattle WA 98101.

Call: (206) 447-1700. **Fax:** (206) 223-6453.

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2017 Marketing Conference



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BANKERS ASSOCIATION

1601 Fifth Avenue
Suite 2150
Seattle, WA 98101
www.wabankers.com



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Who Should Attend?

Make your plans now to attend the 2017 Marketing Conference, specifically designed to provide value and critical take-aways for marketing, public relations, communications and market-research professionals. This year's conference includes presentations designed for marketing and sales professionals. Small business bankers are also encouraged to attend.

Washington Bankers Association would like to thank the following sponsors for their support of this event:

StrategyCorps

For sponsorship opportunities, contact Donna Madsen at donna@wabankers.com or (206) 344-3484.

Tuesday, March 21

8:30-9:00 Registration & Continental Breakfast

9:00-10:15 Welcome

*James Pishue, President and CEO,
Washington Bankers Association,
Seattle, WA*

*David Devine, Senior Vice President,
Marketing Director, Columbia Bank,
Tacoma, WA; Marketing Committee
Chair*

**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 bank 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 off a traditional bank platform.

10:15-10:30 Coffee Break

10:30-11:15 ADA Website Compliance

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

Banks are among the most recent targets of a wave 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 Aligning Data Analytics & 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 this session, 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 the branch business objectives and market growth strategy are aligned, it is time 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.

The speaker will 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 Networking Luncheon

1:30-2:30 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 Coffee Break

2:45-3:30 What Can Institutions with Limited Budgets Do to Utilize Digital Marketing?

*David Devine, Senior Vice President,
Marketing Director, Columbia Bank,
Tacoma, WA; Moderator
Neff Hudson, Vice President, Corporate
Development, USAA, San Antonio, TX
Dave DeFazio, Partner, StrategyCorps,
Nashville, TN
Steven Ramierz, 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 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. Customer experience has become the primary battleground for differentiation in a range of industries. 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. 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 Adjourn

Register today: s.wabankers.com/marketing