



LouisianaBankers

ASSOCIATION

2014 Marketing Conference

December 5, 2014

The Bankers Center, Baton Rouge, LA

9:00am-4:15pm



Who Should Attend

Marketing Managers, Retail Officers, COOs

5555 Bankers Avenue, Baton Rouge, LA 70808 / Phone: (225) 387-3282 / Fax: (225) 343-3159

www.lba.org

Conference Agenda

December 5, 2014, The Bankers Center, Baton Rouge

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

9:00am-10:15am **Constructing an Effective Content Marketing Campaign**
Angela Long & Mary Ellen Slayter, Reputation Capital Media Services

10:15am-10:30am **Break**

10:30am-11:45am **Does Your Product Strategy Make Sense for Your Marketplace?**
Keith Hughey, John M. Floyd & Associates

As consumer interest in value-added financial services increases, it is imperative to evaluate the performance of your existing product mix. If your offerings aren't bringing in the business or revenue you need, you may not have the appropriate strategy to effectively reach existing customers and generate new business. Learn what you need to know to ensure that your products and services match the needs of consumers in your market, and that your fees are competitive. Plus, get tips on how to link products to maximize customer relationships, sales and income.

11:45am-12:15pm **Lunch**

12:15pm-1:30pm **The Ultimate Metric for Customer-Centric Banks**
Dave Nash & Ray Trotta, West Monroe Partners, LLC

Rather than seeking to 'wow' their customers, banks should try to make doing business 'easy' and effortless across touch-points, measured via a multi-channel metric called Customer Effort Index. In addition, banks should address effort and identify pain points via a method called sentiment analysis which uses text analytics to comb through unstructured customer interaction, feedback and social media data. Dave Nash and Ray Trotta of West Monroe Partners will present on these key techniques to better measure marketing ROI.

1:30pm-1:45pm **Break**

1:45pm-3:00pm **Trends in Lifecycle Marketing**
John V. Brinkworth, HC Marketing Services

This session will include current trends in Small Business Acquisition and leveraging surveys and direct marketing to acquire, retain and grow customer relationships.

3:00pm-4:15pm **Marketing Research Case Study**
Sondra Brown, Market Dynamics Research Group

Conference Speakers



Keith Hughey, joined JMFA in 2012, with more than 35 years of consulting and managerial experience. Until founding his own practice, J. Keith Hughey Company in 2008, he was a principal in the WHY Group, LLC. His background includes assisting clients with strategic planning, organizational health and development (human systems), management succession, corporate governance and change management, as well as facilitating productivity and performance improvement using his EMBoS Process™. Keith began his career at Texas Commerce Bank. He became a consultant in 1977, specializing in risk management for financial institutions for 20 years. Since that time, he has focused on developing strategies to fully leverage underutilized human capital assets for organizations. Keith is a widely read author, noted speaker, guest lecturer and a member of the faculty at the Southwestern Graduate School of Banking at Southern Methodist University (SMU), where he teaches classes in strategic management, planning and leadership. In 2012 Keith was named Outstanding Board Member by the Texas Association of Appraisals Districts. He also was named an advisor to the Banking Program at the Mays School of Business at Texas A&M University. He received his Bachelor in Business Administration degree in accounting and completed post graduate studies in finance and economics from the University of Houston.



Dave Nash brings twenty years of experience in both management and technology consulting and executive positions across multiple industries – including banking and credit unions. He currently is a Director in West Monroe Partners' Customer Experience practice focused on Customer Strategy & Insights, based in Chicago. Dave joined West Monroe Partners from CSC Global Business Services-Americas where he was Practice Lead / Principal for Customer Analytics in the Strategic Services Group. Previously, Dave was a director of strategic marketing with CIGNA, where he led the customer value management initiative. Earlier in his career he was also a consultant with Peppers & Rogers Group, a 1-to-1 marketing strategy firm; a manager with E&Y's Customer Connections practice; and an internal marketing consultant for Citibank. His banking and credit union clients have included: Capital One, Citi, Wells Fargo, Key Bank, Discover, and Alliant Credit Union. Dave earned an MBA with high honors from the University of Chicago's Booth School of Business, a Master of Science degree in Integrated Marketing Communications from Northwestern University, and a Bachelor of Science degree in Finance, summa cum laude, from Case Western Reserve University.



Ray Trotta brings over twenty years of experience serving leading global financial services clients. He currently serves as a Senior Manager in the Banking & Capital Markets practice at West Monroe Partners. Prior to joining West Monroe Partners, Ray was responsible for leading the program management practice for Sheshunoff Consulting, a professional services firm focused on the banking industry. His consulting experience also includes roles with the Delivery Services practice of Blackwell Consulting Services (Chicago), the Strategy and Change practice of IBM, and the Financial Services practice of KPMG. Ray began his career in commercial and consumer lending, where he held various management and leadership roles. Ray earned a Bachelor of Science degree in Psychology from Fordham University and a Master of Business Administration degree from Iona College with a concentration in Finance. He is the author of *Translating Strategy into Shareholder Value: A Company-Wide Approach to Value Creation (AMACOM)* and contributing author to *Project Portfolio Management* (John Wiley & Sons).



John Brinkworth has over 30 years of banking and consulting experience. John began his career in community banking working in all areas, including retail, commercial lending and finance. He has been a senior member of several national consulting firms focusing on revenue optimization, change management, product development and process improvement with financial institutions of all sizes. His projects have taken him across the United States, Canada, Europe and Australia. Mr. Brinkworth has a strong background in technology optimization and retail banking. He developed a deposit benchmarking methodology to assist financial institutions in developing strategies for customer acquisition, retention and growth by product type and customer segment. As Executive Director of Strategy, John oversees our Marketing Strategists who assist our clients in developing and implementing marketing and retail strategies to take advantage of market and financial conditions and to improve profitability by targeting growth opportunities. John holds a B.S. in Economics from the University of Illinois and an M.B.A. from Roosevelt University. He is also a Certified Public Accountant.



Marketing Conference

December 5, 2014

The Bankers Center, Baton Rouge

Registration Information *(for additional registrants, please make copies)*

Name _____ Email Address _____
Mr./Mrs./Ms. _____
Bank _____
Street Address _____
City/State/Zip _____
Phone _____ Fax _____

Payment Options

Check (Made payable to the Louisiana Bankers Association)

Visa MasterCard American Express

Card # _____ Expiration Date _____

Amount to be charged on card \$ _____

Name on Card (Please Print) _____

Billing Address _____

Signature _____

Registration Fee

\$225, per LBA member

\$425, per non-member

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\$425, per non-member

Location

The Bankers Center, LBA Office

5555 Bankers Avenue

Baton Rouge, LA 70808

(225) 387-3282 (phone)

(225) 343-3159 (fax)

Cancellation Policy:

Due to commitments we must make to secure a class, we need your help. If you must cancel your registration, please do so at least 3 business days prior to the seminar date to avoid a \$100 cancellation fee. Any registrant who does not cancel will be billed the full registration fee and sent the manual. Substitutions are welcome at no additional charge.

Room Block Information

Residence Inn by Marriott - Towne Center at Cedar Lodge

7061 Commerce Circle, Baton Rouge, LA 70809

For reservations, call (225) 925-9100 and ask for the "Louisiana Bankers Association special room rate of \$112."

Submit registration and view roster in the Education Section of LBA's Website, www.lba.org