

2019 Iowa Bankers Association Marketing Conference



Marketing through a new Lens

April 24-26, 2019 • West Des Moines Marriott Hotel

Do you want to discover ways to change your focus on your marketing and increase profitability and growth for your bank? At the IBA Marketing Conference you can look at marketing through a new lens to gather new ideas, build on your great plans and develop momentum for the future. This year's conference includes sessions on growing deposits, Millennials and banking, compliance, customer experience, marketing strategy, and tools to help you be more productive.

In addition to the information you will gather at the presentations, take advantage of this year's Exhibit Hall for more ideas and solutions. Additional creative inspiration will come from several sessions with your peers where you will have the opportunity to learn and network from the best marketers in the state! The conference is an opportunity for you to get the tools you need to be a better bank marketer. Register today!

Conference Location

West Des Moines Marriott

Room rate: \$124

1250 Jordan Creek Parkway, West Des Moines

Ph. 515-267-1500

A block of rooms has been reserved at the West Des Moines Marriott. Reserve your rooms with the hotel directly. Request the IBA room block for conference rates. After April 3, rooms are available on a space available basis only.

Registration

The conference includes breakfasts, lunch, reception, and all handouts.

	Advance	After 4/18
Members	\$325	\$345
Nonmembers	\$650	\$670

Cancellation Policy: Refunds, less \$20, will be made for cancellation by April 18. Substitutions allowed any time.

Questions & What to Wear

Call IBA at 800-532-1423 with questions about the event. Attendees are encouraged to be comfortable in business casual throughout the conference.

Apps, Dinner & Drinks at Bar Louie

Wednesday, April 24 • 5:30 p.m.

Bar Louie, 7105 Mills Civic Parkway, West Des Moines

Join us for an evening of fun at this West Des Moines fun spot where we will enjoy some beverages and food before the conference officially starts. New to the conference - please join us. It's a great chance to meet some new friends!

Marketing Conference Reception

Thursday, April 25 • 4:30 p.m.

Sponsored by VGM Forbin

Now the work is done for the day! Relax for the day, take some time to talk with your marketing friends, and have a great time. The reception will feature Scott Siepkner. You may know him from his viral videos about Iowa and ESPN appearances!

Conference Website

ibamarketing.com

Conference agenda, hotel registration links, handouts and more are on the IBA Marketing Conference website - ibamarketing.com. It's your source for conference info.

Social Media

#IBAMarketing

Share what you're doing at the conference on social media with the hashtag #IBAMarketing!

2019 Iowa Bankers Association Marketing Conference



Marketing through a new Lens

Wednesday, April 24

5:30 p.m. Apps, Dinner & Drinks at Bar Louie

7105 Mills Civic Pkwy, West Des Moines

Join us for an evening of fun at this West Des Moines fun spot where we will enjoy some beverages and food before the conference officially starts. New to the conference - please join us. It's a great chance to meet some new friends!

Thursday, April 25

8:30 a.m. Registration

9:00 a.m. Welcome & Introductions

9:05 a.m. Unconventional Wisdom to Grow Core Deposits

Sean Payant, Haberfeld Associates, Lincoln, NE

In an increasingly competitive environment, banking must bury its reliance on conventional wisdom about what it takes to grow core customers and increase core deposits. When financial institutions begin executing an omni-channel approach to marketing – big data, digital solutions, geographic relevancy – and align people, products, policies and procedures – results follow: (1) doubling customer acquisition, (2) increasing core deposits, and (3) enhancing profitability. In this fast-paced session, we will discuss how to double overall new customer acquisition and why that can result in a significant improvement in ROA and ROE over time. In this session we will cover:

- Overview of key industry trends
- Marketing strategies to double overall new customer acquisition, core deposits, and profitability
- Keys to driving a significant improvement in ROA and ROE

10:15 a.m. Break with Exhibitors
Sponsored by SHAZAM

10:45 a.m. Millennials and the Changing Landscape of Banking

Lindsay Boccardo, Indianapolis, IN

Millennials are changing the way banks do business. As we race to adapt to their unique needs and diverse consumer expectations, we can feel confused, tired and unsure of what the future really holds. As a consumer, 71% of Millennials would rather see the dentist than listen to what banks are saying. It's easy to see why both parties may not be clicking with each other and causing frustration for the other. The good news: All hope is not lost! In this session, national Millennial expert Lindsay Boccardo will show you how to think differently about the future of banking and your Millennial customer. She will give you the Millennial viewpoint on what's working (and what's not) in banking and what her generation is looking for from you as they enter their early years in the workforce. In this session you'll learn why traditional strategies aren't working like they used to, what Millennials worry about as consumers and why it matters, what Millennials want when they walk into your bank, and the factors that are facing Millennial financial decisions.

11:45 a.m. Lunch
Sponsored by Convergent Technologies/SPC

1:00 pm. Don't they know my bank is the best – Discovering Consumer Opinions Panel

Moderated by Lindsay Boccardo

Listen to bank customers share their thoughts about their banking relationship and what makes them raving fans about their bank and what may make them start looking. We'll talk to several generations of bank customers and small business owners about how they see their bank and what they are looking for as consumers.

2:00 p.m. Break with Exhibitors
Sponsored by SHAZAM

2:15 p.m. Providing a Frictionless Banking Experience: What Banks Can Learn from Apple

Joe Salesky, CRMNext, Navato, CA

As the pace of change in the financial services industry continues to escalate, banks are faced with the dilemma of staying relevant while continuing to grow profitability in an increasingly competitive marketplace. We know customers' profitability and loyalty are closely correlated with the engagement they have with individual brands, and for today's consumer, a frictionless yet collaborative experience is key. This session will help you answer the question "Is it easy for my customers to do business with my bank?" and provide ideas on how you can make it easier for your customers to work with you so the experience feels frictionless.

3:15 p.m. Break with Exhibitors
Sponsored by SHAZAM

3:30 p.m. Will My Compliance Department Flag This Ad?

Julie Gliha, Iowa Bankers Association, Johnston

Are you new to marketing or need a refresher on advertising rules? We'll review bank advertisements as a group, discuss, and then see what is compliant and what isn't, and why. Once we have the basic information, we'll ask you to write the advertising message and talk as a group about making sure your messages pass the compliance test.

4:30 p.m. Reception with Exhibitors featuring
Sponsored by VGM Forbin

Now the work is done for the day! Relax for the day, take some time to talk with your marketing friends, and have a great time. Then stay as the fun continues with "Iowa Nice Guy" Scott Siepker. Scott is the host of the Emmy-nominated Iowa Outdoors on IPTV and actor in dozens of plays, commercials, and live events. You may know him from his viral videos about Iowa and his ESPN appearances!

Friday, April 26

- 7:30 a.m. Networking Breakfast & Roundtable Discussion Session**
Enjoy a full breakfast buffet and network with your marketing peers about the issues that matter to you most.
- 8:00 a.m. Big Ideas for Bank Marketing - Strategies to shake up the status quo in 2019**
Joe Sullivan, Market Insights
Customer expectations are at an all-time high and only the creative, agile marketer will be able to help their institution stay competitive. Innovative new tools, platforms, and technologies continue to disrupt the bank marketing landscape. This annually updated session explores emerging consumer behaviors and the marketing trends that should guide your strategic choices in 2019. This session is designed to inspire innovative thinking and help bank marketers navigate an increasingly digital landscape. Participants will look at tangible ways to move beyond the basics and breathe new life and success into their marketing efforts.
- 9:00 a.m. Break**
Sponsored by SHAZAM
- 9:15 a.m. Mimosas & Marketing! Learn from a Marketer – Talking to Your Peers to Find the Answers**
Do you feel like you are the workhorse of the bank? Join us for this popular session we've carried over from last year! We are still getting down to business with this fast-paced session, but you can also enjoy a breakfast beverage with your peers. We'll use this time to help you get to know other conference attendees and discuss current issues and trends in marketing in a facilitated round-table session.
- 10:15 a.m. Break**
- 10:25 a.m. From Distracted to Productive: Finding Your Productivity and Focus in a Hyper-Interrupted World**
Randy Dean, The E-mail Sanity Expert
E-mail. Texts. Interruptions. Project Transitions. Office Clutter. Social and Other Media. Your Smart Phones and Tablets. Even Family and Friends. How do you manage all of these "squirrels" that are driving you crazy? These key "distractors" sometimes make it almost impossible to get anything done. It sometimes seems like there is always at least one SQUIRREL getting in the way of what you really need to do. But with some forethought and effective strategies, as well as some personal discipline, it is more than possible to find your focus once again, even in a hyper-distracted world. As a matter of fact, those using these strategies will have a long-term competitive advantage -- both professionally and personally. In this new program by popular time & tech management speaker Randy Dean, MBA, we'll look at each of these key areas of distraction and define strategies for enhancing long-term focus, productivity, and performance. We'll share "game plan" ideas for getting and keeping your distractors (SQUIRRELS!) under control, and finding critical "focused productivity" time each and every day, leading to not only performance but also clarity of mind and purpose.
- 11:40 a.m. Door Prize Drawing & Adjourn**

Featured Speakers

Sean Payant, Chief Consulting Officer, served as the Executive Director of the Schools of Banking for nine years prior to joining Haberfeld. He has administered, instructed, and authored materials for 17 different banking schools attended by bankers from 18 states. He has published articles on financial institution marketing, employee engagement, goal setting and community financial institution differentiation. Sean has presented more than 100 keynote and breakout sessions at industry meetings. He holds Masters and Doctor of Philosophy degrees from the University of Nebraska.



Lindsay Boccardo is a Millennial expert, and not just because she is one.



For over a decade she has coached, researched and developed programs for Millennials. Lindsay provides education and training through one-to-one programs, group coaching and seminars to help empower employees to develop themselves into the top talent in their organization. Lindsay has partnered with organizations such as Cars.com, Internbridge and the Indiana Supreme Court. She is committed to bringing generations together in the workplace to build strong companies where Millennials can make powerful contributions.

Joe Sullivan is the CEO and Founder of Market Insights. As a consultant, author and speaker with more than 25 years of experience in the industry, the themes of relevancy and growth can be found throughout Joe's work. Over the years, Joe has been invited to share his insights with many international, national, regional and state associations and banking schools — on topics ranging from marketing and delivery network planning, to brand positioning and leadership.



Randall Dean, MBA, and author of the recent Amazon.com #1 E-mail Bestseller, *Taming the E-mail Beast*, has 25 years of experience using and teaching an advanced time management/personal organization system, including systems for effective e-mail management, office clutter reduction, optimizing your Outlook and/or Gmail/Google usage, and getting the most from affiliated smart phone and tablet devices. He has taught different versions of his time & e-mail management systems for many prominent organizations including Procter & Gamble, Michigan State University, University of California Berkeley, Westinghouse Electric Company, Volvo, and The Michigan, Indiana, Texas, and Iowa Societies of Association Executives for groups as small as five and as large as 550.



2019 Iowa Bankers Association Marketing Conference



Marketing through a new Lens

April 24-26, 2019 • West Des Moines Marriott Hotel



Marketing through a new Lens

2019 Iowa Bankers Association Marketing Conference

April 24-26, 2019
West Des Moines Marriott Hotel

Registration

The conference includes breakfasts, lunch, reception, and all handouts.

	Advance	After 4/18
Members	\$325	\$345
Nonmembers	\$650	\$670

Cancellation Policy: Refunds, less \$20, will be made for cancellation by April 18. Substitutions are allowed at any time.

Mail form with payment:

Attn: Registrar
Iowa Bankers Association, PO Box 6200
Johnston, IA 50131

or Register online at www.iowabankers.com

Bank _____

Address _____

City _____ State _____ Zip _____

Phone _____ Fax _____

Name _____

Email _____

Name _____

Email _____



IOWA BANKERS
ASSOCIATION

8800 NW 62nd Ave. • Johnston, IA 50131

Ph. 800-532-1423

www.iowabankers.com