



VIRTUAL MARKETING SEMINAR: WINNING NEW CUSTOMERS IN TIMES OF CHANGE

June 8, 2021

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Tuesday, June 8

Moderator:	Nicky Senyard – CEO and Founder, Fintel Connect
10 – 10:55 am	Part 1: The Customer Journey in Banking Maureen Flaherty – SVP & Chief Marketing Officer, Kennebunk Savings Booshan Rengachari – Founder, Finzly James Roy – SVP of Digital Marketing, People’s United Bank
10:55 – 11:10 am	Stretch Break
11:10 am – 12:05 pm	Part 2: Financial Product Marketing Mary Coleman – Director of Advertising & PR, Extraco Consulting Andrew Kraemer – Personal Finance Writer & Founder, WalletSquirrel.com Liz McIntyre – Director of Social Media & PR and VP of Marketing, Renasant Bank
12:05 – 12:45 pm	Lunch
12:45 – 1:45 pm	Part 3: How Your Bank Can Partner with Influencers, Both Large and Niche Lauren Greutman – Debt Free Life Coach, LaurenGreutman.com Megan Hryndza – Co-Founder, mightydeposits.com Amy Tabash – Director of Sales & Strategic Partnerships, Webpals Finance
1:45 – 2 pm	Stretch Break
2 – 3 pm	Part 4: Key Metrics for a Successful Digital Strategy Matthew Entringer – Digital Media Manager, UMB Bank Joshua Kopac – Director of Sales, Prodege
3 – 4 pm	Part 5: Closing Remarks, Tips & Considerations for Digital Marketing Success
4 pm	Adjourn

Part 1 – The Customer Journey in Banking: Creating an Effective Customer Experience

- Modern banking behavior
- The stages of the customer journey
- Making the journey about the customer
- Metrics of measurement to ensure success

Part 2 – Financial Product Marketing: Choosing the Digital Channels to Acquire New Customers

- SEO and content marketing
- Social media marketing



- Paid search
- Email marketing
- Affiliate (performance) marketing

Part 3 – How to Partner with Publishers and Influencers, Both Big and Small

- What role do publishers/influencers play in the customer buying journey
- How do you as a bank connect with the publishers?
- How to find the right publishers/social media influencers:
 - Relevance
 - Examples of influencers
 - Working with publishers and influencers on a performance basis
 - How to stay compliant while working with publishers and influencers

Part 4 – Key Metrics for a Successful Digital Strategy

- Forecasting and goal setting
- Calculating your complete customer acquisition cost and understanding your ROI
- Data aggregation
- Campaign attribution
- Tracking and optimizing campaigns

Part 5 – Closing Remarks

- Tips on implementing digital marketing
- Strategies for testing and learning
- How influencer marketing helps combat the brand trust issue in financial services
- How to track and optimize campaigns