

Credit Union

Marketing & Business Development CONFERENCE

July 16–18, 2008 • Cleveland, OH



*Be right on the money with your **marketing**
and **business development** strategies.*

The Power of Partnership



It's an exciting and challenging time to be a credit union marketer.

Times are changing, members are changing, and strategies are changing. What's next, and how should you adapt your efforts to achieve the best results? In this conference presented by the Ohio Credit Union League, Pennsylvania Credit Union Association, and Credit Union National Association, you'll learn where to focus your efforts to strengthen member loyalty, capture new markets, and grow your credit union.



GENERAL SESSIONS:

Focus Your Marketing and Business Development Efforts for the Current Economy

Bob Hoel

It's hard to see the silver lining in today's headlines – a recession, the mortgage meltdown, higher energy costs, and a weaker job climate. But historically credit unions have found ways to not only survive, but thrive in tough economic times. Learn where to focus your marketing and business development efforts today.

What Are Your Members Looking for in a Financial Institution?

Bob Hoel

From experience and past results, you may think you know what members are looking for in a financial institution. But recent credit union research findings may surprise you. In this session, you'll gain a better understanding of what consumers are looking for in financial services and how your credit union should respond.

Relationship Marketing: Defining and Succeeding

JL Glass

Relationship marketing is a familiar concept, but your success greatly depends on how it's applied. Discover where to focus your efforts for more successful relationship marketing. Learn the tools and how to apply them to your marketing initiatives.

Business Development Programs That Get Results

Claudine Oriani

Are you tired of the same old business development practices? Well, so are your existing and prospective markets! Discover how to brand your way to success, connect credit union values to specific markets, and refine your business development sales pitch.

Roundtable Discussions

Here's your opportunity to exchange ideas and plans with other attendees. You'll have the opportunity to discuss topics such as branding, business development, technology, low cost marketing opportunities, and more.

Register online today!

Visit training.ohiocreditunions.org or training.pcu.org and choose Event Calendar.

For registration information or assistance, e-mail reginfo@cuna.coop or call 800-356-9655, ext. 4882

BREAKOUT SESSIONS:

Measuring Member Loyalty

It starts with one simple question for members – “Would you recommend us to a friend or colleague?” The result, your Net Promoter Score, allows you to track promoters and detractors and measure the credit union’s growth and performance. Discover how this key question, combined with other research findings, can put you on the path to success.

New Ways to Reach the Young Adult Market

JL Glass

The goal is simple. Attract younger members to make sure your credit union is viable for the long term. The steps for achieving that goal are a bit more challenging. Discover the latest, most successful strategies other credit unions are using to connect with young adults.

Pennsylvania Statewide Marketing Initiatives Update: iBelong

Jay Young

It’s one year into Pennsylvania’s statewide branding campaign – iBelong – and what have we learned? What has been the campaign’s impact on the perceptions of potential members? What new marketing strategies are being implemented? What does the future hold for iBelong?

Ohio Statewide Marketing Initiatives Update: The Difference, YOU

Katie Walton

For the next two years, Ohioans will discover the credit union difference through a statewide advertising campaign, “The difference, YOU,” featuring “Bob, the credit union guy.” The Ohio Credit Union League purchased the promotional materials and licenses for this successful, award-winning campaign created by the Utah League of Credit Unions. You’ll see the elements of the campaign, hear how state chapters are using it, and learn how your credit union can leverage it to grow membership.

Market Segmentation: Know Your Market

JL Glass

Discover how and why to focus your marketing efforts on the prospects who are most likely to use your services. If done properly, you’ll get the highest return on your marketing efforts. Learn about the different tools for credit unions and hear some success stories.

SEG Development

Dennis Paul

Developing Select Employee Groups (SEGs) is an important priority for many credit unions. Learn what opportunities are available and discover ways to increase penetration among existing and potential SEGs.

Direct Mail Marketing: Get Noticed by Your Members

JL Glass

Why does some direct mail get read, while the rest goes into the circular filing cabinet? What do research and marketing trends tell us about direct mail? Discover strategies to improve the success of your credit union’s direct mail campaigns.

Maximize the Effectiveness of E-mail Marketing and Member Surveys

Roger Slayton

Take this opportunity view the trends and identify the challenges in e-mail marketing and member surveys. Discover strategies that successful organizations are using to stand out in the marketplace.

Financial Literacy: Teaching Your Way to CU Growth

Claudine Oriani

Financial education programs can be used to build trust and deepen relationships with members. Plus, they can also get your foot in the door with community and employer partnerships. Learn about cost-effective ways to use financial literacy initiatives to grow your credit union.

Best Practices in Different Medias

You’ll see examples of award winning marketing initiatives and mediums that produced results. Learn about the marketing strategies behind these projects.



JL Glass never misses an opportunity to entertain while he

teaches. As president and owner of Leland & Associates, a marketing and advertising firm in Minneapolis, he worked with a long list of clients including SAM'S Club, ACE Hardware, Texaco, Billy Graham Association, Mercy & Unity Hospitals, and Next Media. His 25 years as an entrepreneur have provided countless experiences that add credibility to his message.



Bob Hoel, Ph.D. is the Filene Fellow in Residence at the Filene

Research Institute and Professor Emeritus of Business at Colorado State University. Filene Research Institute is the credit union industry's "think and do tank" for credit union and consumer finance issues. A popular speaker worldwide, Bob frequently speaks about credit union challenges and opportunities at meetings of credit union leaders.



Claudine Oriani's thought-provoking presentations on marketing,

branding, leadership, strategic planning, service, and financial literacy have received superior marks from thousands of participants. She has been involved in adult education design and delivery for the past 25 years, 15 of which have been spent in the credit union movement.

Registration Form

Marketing & Business Development Conference July 16-18, 2008 • Cleveland, OH

Standard Registration

- Marketing & Business Development Conference (OH07168) **\$379**
- Additional attendee **\$329**

Registration for CUs Under \$20 Million in Assets

- Small CU **\$284**

Total Enclosed \$ _____

Attendee Information

Legal name _____

Name preferred on badge _____

Title _____

CU name _____

CU mailing address _____

City _____ State _____ Zip _____

Daytime phone number (____) _____

Fax number (____) _____

E-mail address (required) _____

(Important confirmation and program information will be sent via e-mail)

- Check here if you have any disability that requires special services

In case of emergency, please contact (required):

Day contact name _____

Phone (____) _____

Night contact name _____

Phone (____) _____

Completion of this form shall signify authorization to assist the registrant in emergency situations and to use the information on the form, or otherwise provided by registrant, in such situations.

Payment Method *(Payment must accompany registration)*

- Check/share draft *(Payable to Credit Union National Association)*
- Credit card *(Fax to 608-231-4327)*

Charge \$ _____ to my Visa® MasterCard®

Card account number _____ / _____ / _____ / _____

Expiration date _____

Print name as it appears on card _____

Signature _____

If you do not receive confirmation within two weeks of registration, please call 800-356-9655, ext. 4387.

Confirmations

You will receive a registration confirmation within three business days if you pay by credit card or ACH. Please allow 10 days if you pay by check.

Cancellations

Cancellations received in writing (via fax 608-231-4327) seven or more days before the start of the program are eligible for a refund of the amount paid minus a \$50 administrative fee. No refunds will be granted if cancellation is received six days or less before a program begins. Substitutions are accepted anytime prior to the start of the program at no additional cost. Simply fax event and contact information, listing the new participant and who they will be replacing.

RESOURCES FOR CREDIT UNION MARKETERS

Marketing & Leadership Webinars

Here's just a sampling of the 150 CUNA webinars offered this year. Maximize your training budget with a webinar package. Visit training.cuna.org and choose *Webinars & eSchools*.

- CU Response to the Current Economy: Marketing, May 15
- Best of the 2008 CUNA Marketing & Business Development Council Conference: Business Development, May 20
- Best of 2008 CUNA Marketing & Business Development Council Conference: Marketing, June 24
- Legendary Credit Union Leadership, Aug. 20

CUNA Marketing Management Schools

June 8–13 • Seattle, WA

Tuition is \$1,395

Take a fresh approach in your credit union's marketing efforts – from strategies to research to implementation.



POWERED BY CUNA

America's Credit Union Conference & Expo

June 29–July 2

New York, NY

Want to power up your credit union with all the knowledge, insights, and innovation vital for success? You'll hear from some of today's most knowledgeable and creative leaders at the America's Credit Union Conference & Expo. Tuition is only \$895, or \$400 for credit unions with less than \$35 million in assets. To learn more visit events.cuna.org.



CUNA
Marketing & Business
Development
COUNCIL

CUNA Marketing & Business Development Council

Target a market, tell a story, convey a message, and make an impression. Marketing and business development professionals understand it's all about reaching people. With nearly 1,000 members, the CUNA Marketing and Business Development Council offers resources and expertise to help you hit the mark. A membership comes with an array of discounts, including \$100 savings on most CUNA conferences, \$250 off the non-member rate on the Council's conference, and \$50 savings on CUNA webinars. To become a member, visit cunamarketingcouncil.org.

Hotel & Registration Information

Who Should Attend?

This training is valuable for marketing and business development professionals, as well as CEOs and managers responsible for the success of business development and marketing.

Location

Marriott Cleveland Downtown

127 Public Square

Cleveland, OH 44114

Phone: 800-228-9290 or 216-696-9200

Fax: 216-696-0966

Room rates: \$139 sgl/dbl plus tax

Reserve lodging by June 12, 2008

The hotel is located in the heart of Cleveland's business district near the Rock and Roll Hall of Fame and Progressive Field (formerly Jacobs Field). Rising 25 stories above the city, you'll enjoy breathtaking views of Lake Erie.

Tuition

Tuition is \$379 for your first registrant and only \$329 for each additional attendee. Credit unions with less than \$20 million in assets receive a 25% discount by entering code SREG.

ACH Payment Option

If you register online, you can pay directly from your credit union's corporate account using ACH. For step-by-step instructions for paying by ACH, visit training.ohiocreditunions.org or training.pcua.coop.

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AGENDA

Wednesday

- 1:00–2:00 p.m. Registration
- 2:00–3:30 p.m. What Are Your Members Looking for in a Financial Institution?
- 3:45–5:00 p.m. Focus Your Marketing and Business Development Efforts for the Current Economy
- 5:30–6:30 p.m. Reception

Thursday

- 7:45–8:30 a.m. Continental Breakfast
- 8:30–9:45 a.m. Relationship Marketing: Defining and Succeeding
- 10:00–11:15 a.m. BREAKOUT SESSIONS:
 - Measuring Member Loyalty
 - New Ways to Reach the Young Adult Market
- 11:30 a.m.–Noon Statewide Marketing Initiatives Updates:
 - Pennsylvania: iBelong
 - Ohio: The Difference, YOU

Noon–1:00 p.m.

Lunch

1:00–2:00 p.m.

BREAKOUT SESSIONS:

- Market Segmentation: Know Your Market
- SEG Development

2:15–3:15 p.m.

BREAKOUT SESSIONS:

- Direct Mail Marketing: Get Noticed by Your Members
- Maximize the Effectiveness of E-mail Marketing and Member Surveys

3:30–4:30 p.m.

BREAKOUT SESSIONS

- Financial Literacy: Teaching Your Way to CU Growth
- Best Practices in Different Medias

Friday

7:45–8:30 a.m.

Continental Breakfast

8:30–10:00 a.m.

Business Development Programs That Get Results

10:15–11:45 a.m.

Roundtable Discussions



CUNA
Credit Union National Association

PO Box 431 | Madison, WI 53701-0431

Brought to you by the
Ohio Credit Union League,
Pennsylvania Credit Union
Association, and CUNA.

