A RECIPE FOR SUCCESS

EAST COAST MARKETING & BUSINESS DEVELOPMENT CONFERENCE 2019

SEPTEMBER 26-27 • RICHMOND, VIRGINIA

VIRGINIA CREDIT UNION LEAGUE
ONE VISION. ONE VOICE.

CREDIT UNION Marketing & BUSINESS DEVELOPMENT COUNCIL OF VIRGINIA

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WE'RE HERE TO HELP YOU FIND YOUR RECIPE FOR SUCCESS.

One of the things that makes the credit union marketplace truly unique is the fact that those who experience success are willing to share their recipe with the rest of the cooks in the credit union kitchen. Still, memorable, delicious marketing doesn't happen by accident. It is the result of a well-thought-out blend of creative "herbs and spices" and expert preparation and execution.

The Credit Union Marketing & Business Development Council of the Virginia Credit Union League has assembled a team of "top chefs" to share with you their RECIPE FOR SUCCESS.

OUT OF THE FRYING PAN, INTO THE FIRE.

Register today at only $349 for both days!
$329 for each additional attendee from your credit union.

Hotel: Hilton Richmond Downtown
501 E. Broad St., Richmond, VA 23219

#ECMCINTOTHEFIRE

REGISTER AT VACUL.ORG/EVENTS

AGENDA

WEDNESDAY, SEPTEMBER 25, 2019

Welcome Reception / Networking 7:00 - 8:00 PM

Join us for cocktails and light bites at the Credit Union House of Virginia!
108 N. 8th Street, Richmond 23219, just two blocks from the hotel.

THURSDAY, SEPTEMBER 26, 2019

Registration / Breakfast / Vendor Exhibits 8:00 - 9:00 AM

Opening Announcements and Welcome 9:00 - 9:15 AM

Andrew Alegre, VA Credit Union Marketing & Biz Dev Council Chairman

Silos Are Meant to be Bent, Not Broken 9:15 - 10:30 AM

Randy Schultz, Weber Marketing Group

Time to get OFF this bandwagon. Yes...we hear it from experts and credit union gurus at every conference, workshop, and marketing school and organizational presentation: "We need to break down these silos to be successful!" I think not. Why? We'll take a look at:

- The challenges created by silos in your organization
- Starting small to create buy-in and momentum
- How you become one of the tribal influencers with the power to shift organizational norms

You'll take home 3 ways to be a Tribal Influencer and bend silos at your credit union. Working together, bending silos, we have the ability to form true bonds across the typical flow charts that give rise to a culture, a brand, an organization that is smart enough to make a difference, and sexy enough that people actually want to be part of it. Instead of hoarding talent in silos, the collaborative process of building your own group of Tribal Influencers can spark collaboration and elevate your brand to new heights.

Break / Vendor Exhibits: 10:30 - 10:45 AM

Let's Build a Zoo 10:45 - 11:45 AM

Jimmy Marks, JimmyMarks.com

What's the right way to build a team of creative professionals that works well together? How do you avoid "BIDASO," and what does that even mean? How can a business with a long history of thinking about technology after-the-fact become "Digital First"? Jimmy Marks, a User Experience Designer/Developer with a long history in credit unions and finance, has been there and he's happy to share what he's learned about major tech projects, team building, taxidermy (yes, you read that correctly) and being the next best iteration of yourself.

LUNCH / VENDOR EXHIBITS

11:45 AM - 12:45 PM

THE GREATEST INFO SINCE SLICED BREAD

Serving the Millennial Mom 12:45 - 1:45 PM

Lacy Briney, The Mom Complex

The largest generation in history is stepping up to the parenthood plate and rewriting the rule book. Compared to previous generations, Millennial Mothers are doing things differently when it comes to the way they plan and buy for their households and families. Lacy Briney, Director of Strategy at The Mom Complex, has developed mom-focused solutions for brands like Walmart, Unilever and Johnson & Johnson and will explain how solving the pain points of modern motherhood can drive loyalty for your business.

BREAK / VENDOR EXHIBITS

1:45 - 2:00 PM

Flavorless to Fabulous: A Roundtable Experience 2:00 - 3:00 PM

Marketing and Business Development Council of Virginia

One of the most frequent comments on this conference's evaluations is that you get some of the most helpful suggestions from your peers. This lively roundtable experience will give you the opportunity to explore how others have overcome some of their toughest challenges and turned them into triumphs.

Hot Take: Turning Data into Action 3:00 - 4:00 PM

John Pastor, GoMarquis

Learn how to leverage the power of your data and create specific, relevant, and timely marketing that drives response and return on your marketing investments.

Vendor Reception 4:00 - 5:00 PM

Before you step out for the evening, stop in for drinks and nibbles compliments of our vendors!

A TASTE OF RICHMOND

(optional event)

6:00 - 9:00 PM

Join us for a walking gastronomical progressive tour of the neighborhood. Three locations for satisfying the inner gourmand. To attend, please let us know when you register because we need a firm registration count!

FRIDAY, SEPTEMBER 27, 2019

Continental Breakfast 8:30 - 9:00 AM

Preparing an Onboarding Banquet: Building a Killer Program That Grows and Retains Relationships 9:00 - 10:30 AM

Joyce Colins, 360 View

Everyone knows how crucial the first few months are in any new banking relationship. And yet credit unions say they are deeply disappointed with their own onboarding efforts. In this session, you'll learn how to fix your financial institution's onboarding problems by building a positive and effective program — one that grows your revenue, increases retention, and improves the experience.

Checkout Break 10:30 - 11:00 AM

The Right Mix: Get Your Recipe for Success 11:00 AM - 12:00 PM

Donna Tyson, Donna Tyson, Inc.

In this entertaining keynote, Donna will look at all the necessary ingredients involved in creating a distinctive "recipe for success". In addition to being committed to using only quality products, one must have the courage to personalize their creation by adding a large dose of creativity, a positive attitude, and a constantly renewing passion for excellence.

Lunch, Door Prizes & Wrap Up 12:00 – 1:00 PM

#ECMCINTOTHEFIRE

Going Off-Recipe: Fresh, Free Resources from the Federal Reserve 1:00 - 2:30 PM

Alexandra Cornwell, Federal Reserve Bank of Richmond

Looking for fresh resources to teach economics and personal finance concepts? Join us on a guided tour to the Federal Reserve Bank of Richmond (a two-block walk from the hotel), where we will tour their museum: The Fed Experience. Then learn about opportunities and educational resources for your members of all ages.

THANK YOU

Thank you to the 2018-2019 Credit Union Marketing and Business Development Council of Virginia for your help in making this conference possible!

Andrew Alegre, Blue Eagle Federal Credit Union (Chair)
Greta Kidd, ValleyStar Credit Union (Vice Chair)
Chris Miller, Chesterfield Federal Credit Union (Chair Emeritus)
Daniel Briere, RVA Financial Federal Credit Union
Janine Williams, UVA Community Credit Union (Board Liaison)
Sarah Marks, Fort Lee Federal Credit Union
Randa Hayes, NSWC Federal Credit Union
Dawn Lindley, Virginia Credit Union League (Staff Liaison)
Nicole Widell, Virginia Credit Union League (Staff Liaison)

MEET OUR TOP CHEFS

cooking up fresh ideas on the cutting edge

Lacey Briney, of The Mom Complex, is our strategy powerhouse. She's a pro when it comes to distilling the nuances and complexities of consumer insights into actionable frameworks clients can actually use. Prior to joining The Mom Complex, she honed her brand strategy and innovation skills at Redscout in New York City, consulting for Fortune 500 clients across categories from baby to booze, including SC Johnson, PepsiCo, Miller-Coors, Jet.com and Kate Spade (her personal favorite). When she's not brainstorming new products and services with our Maverick Moms, Lacy is planning her next vacation (she has a serious case of wanderlust).

Joyce Colin is the CEO of One View. As a previous CIO for a $1.8 billion commercial bank, Joyce directed bank-wide technology strategies, with a background in business process automation. Her 30 years of banking experience spans Operations, Data Processing, Core Banking Systems, CRM Implementations and Information Technology. Joyce has been a National Sales Representative for 360 View for over 10 years providing insight into sales and service automation, enhancing business processes and improving overall customer experience through the use of 360 View.

As part of the Economic Education Outreach team, at the Federal Reserve Bank of Richmond, Alex Cornwell contributes to the development and delivery of economic and financial education programs for teachers, students and the public. Prior to joining the Federal Reserve Bank of Richmond, she taught Spanish and Sociology and spent several years managing the design and editing of academic publications. Alex has a B.A. in Spanish and Psychology from Radford University and an M.S. in Sociology from Virginia Commonwealth University.

Jimmy Marks, president of JimmyMarks.com, is a UX/UI designer and developer for a Fortune 500 company focusing on government technology. Prior to that, he worked for Science Magazine, DigitalMailer (now Documatix), and The Cooperative Trust (aka "Crash," now a subset of Filene Research). He is passionate about creating interesting things that work well for every kind of user. He lives in Richmond, VA with his wife and daughter.

John Pastor has been in the financial services industry for over 26 years. Recognizing the changes within the industry, he changed focus to big data analytics and ROI synergies. He now serves as Vice President and Regional Manager at Marquis Software, helping institutions analyze their data and showing them how to act on the results.

Randy Schultz is the VP of Marketing for Weber Marketing Group, and has a true passion for listening, mentoring, coaching and teaching marketers to differentiate a unique promise of value in their lives and the work they are inspired to live out every day. Having worn many hats on the path to where he is today (rancher, entrepreneur/ business owner, creative director, marketer and strategist, father, and dog rescuer), It's uniquely positioned Randy as a solution-provider for those at the c-suite level of credit unions and those who aspire to get there.

Donna is a nationally acclaimed motivational speaker known for her ability to touch hearts and inspire people to reach their highest potential. Her unique style has been described as a "a cross between a preacher, a politician, and a comedian." Donna leaves her audiences spellbound as she weaves her stories of empowerment. She draws on her experiences as a former television and radio talk show host, successful business owner, community leader, missionary, cancer survivor, mother and grandmother for her thought provoking life lessons.

RECIPE FOR A GREAT IDEA

3-ingredients for an amazing idea

1. ***Curiosity*** and a willingness to analyze and admit where your marketing efforts are currently coming up a half-cup shy of success.
2. ***The East Coast Credit Union Marketing Conference,*** a two-day all-you-can-eat buffet of amazing ideas.
3. ***Confidence*** to put your awesome idea into motion. Sometimes the only thing holding back the success of your idea is your own fear.

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Hilton Richmond Downtown

501 E. Broad St., Richmond, VA 23219

Hotel Discounted rate of $165 is good Wednesday through Saturday
(a deposit of 1 night is required at the time of reservation)
Call 804-344-4300 and use code VACUL.

GET IT WHILE IT'S HOT!
SPECIAL HOTEL RATE IS OFF THE TABLE ON AUGUST 29.

OUT OF THE FRYING PAN, INTO THE FIRE. REGISTER NOW!

Name of Credit Union: _____

Address of Credit Union: _____

Name of Attendee: _____

Title: _____

Email: _____ Phone: _____

[ ] Registration: $349

Name of Attendee: _____

Title: _____

Email: _____ Phone: _____

[ ] Additional Registration: $329

Name of Attendee: _____

Title: _____

Email: _____ Phone: _____

[ ] Additional Registration: $329

[ ] Sign me (us) up for the Taste of Richmond Progressive Tour!
_____ x $50 per person.

ONLY $349 FOR BOTH DAYS

$329 for each additional attendee

To register online and pay by credit card, visit www.vacul.org/events. If you are paying by check, please make the check payable to the Virginia Credit Union League and mail with completed form before **September 7** to:

Virginia Credit Union League,
Attn: East Coast Marketing Conference
PO Box 11469, Lynchburg, VA 24506

TOTAL $

If you have questions or need additional information, please contact Cathy Baldwin, at cbaldwin@vacul.org or 800.768.3344, ext 615.

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