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*General session and breakout session topics  
Presentations are customizable to meet specific audience needs  
Topics for executives, management, directors and staff*

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## BRANDING & MARKETING

### Building A Lasting Brand—Advanced Branding for Credit Unions

Branding is more than just changing a few brochures or the look of a newsletter. Much more. A true comprehensive branding program will take years to develop and will impact the entire organization. Your credit union doesn't just "do" branding one year and mark it off its "to do" list: your credit union must "live" the brand every day. Having led his credit union through a name change and ongoing branding efforts, Arnold provides practical information on what to do and not do with your credit union's brand. This session provides:

- Maintaining Brand Consistency and Momentum
- Lovemarks & Emotional Branding
- Gaining Staff Buy-In
- Brand Leadership in the 21st Century

### Top 10 Marketing Trends Every Director Should Know

Credit unions must become savvy marketing organizations to survive in the future, which means their board members must have a working knowledge of this key field. As a marketing executive and author, Arnold provides thoughtful insights for credit unions to consider. This session examines trends including:

- Marketing & technology fields merging
- CRM will dominate
- Sales culture rules!

*Note: This session can be modified for staff and managers.*

### It Takes A Village: Community Charter Marketing

CUNA's E-Scan implores credit unions to "be involved in community activities." However, true community charter marketing is much more than being at an event here and there: it takes a strategic approach. More and more credit unions are evolving into institutions serving larger populations. As a senior vice president who led his credit union from a single sponsor to a community chartered credit union, Arnold offers information and ideas for maximizing your reach into your communities. This session covers:

- Community marketing strategies
- How non-community charters can compete against community charters
- Targeting your community
- Community marketing tips and tactics
- Formula for successful community marketing



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## BRANDING & MARKETING

### Got Brand? Successful Credit Union Branding Strategies

Does your credit union have a strong brand identity? When your members see your credit union's logo or hear the credit union's name, does a consistent image come to mind? By giving brands distinctive qualities, brand marketers create loyalty for their products, services and credit union. Having led his credit union through a name change process, Arnold provides practical information on what to do and not do with your credit union's brand. This session provides:

- The lexicon of branding
- Brand benefits
- Tactics for implementing a branding program
- Brand consistency

### ¿Se Habla Español? Developing A Hispanic Marketing Strategy

Does the "Got Milk?" campaign work in Mexico? Hardly. The Spanish translation for "Got Milk" is "are you lactating?" Simply translating marketing campaigns into Spanish can lead to failure. The Hispanic population is the fastest growing population segment in the United States. Wanting to market to Hispanics is different than doing so successfully. As author of CUNA's white paper *Marketing to Hispanics* and the person responsible for his credit union's Hispanic initiatives, Arnold offers ideas for reaching this demographic. This session provides:

- An overview of Hispanic statistics and demographics
- Products Hispanics tend to want and segments within this group
- Strategies for reaching Hispanics
- Tactics for serving the Hispanic community

### Promotions 101

Marketers are using all kinds of avenues with their promotions: radio, TV, mail, e-mail, billboards, sky-writing and even bathroom stalls. But promotions is not about slapping a message somewhere and hoping it sticks. To be a successful marketer, you have to know the basics of promotions, or Promotions 101. As a credit union marketing executive, Arnold gives key points on how to conduct a successful promotion. This session provides:

- Promotion Basics
- Promotion Plan
- Promotion Components
- Measuring Promotion Performance
- Promotion Tips



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## BRANDING & MARKETING

### Membership Growth Recipe: Business Development & Community Relations

Every credit union wants to grow their membership. In the past, credit unions rushed to acquire more and more new SEGs to attain that growth. However, just acquiring SEGs does not automatically lead to success. Credit unions must partner and penetrate those companies. Business development activities are also evolving into more community relations efforts. Community charter marketing is more than being at an event here and there: it takes a strategic approach. Membership growth today involves both the key ingredients of both business development and community relations. This session covers:

- Business development strategies
- Partnering with existing SEGs to increase penetration level
- Measuring business development success
- Community relations tips and tactics
- Formula for successful community relations

*As a senior vice president who led his credit union from a single sponsor to a community chartered credit union, Arnold offers information and ideas for maximizing your reach with your SEGs and communities.*

### Trading Spaces Marketing: The Look of a \$25,000 Campaign for \$1,000

A big budget does not equal great marketing. And more importantly, great marketing does not require a big budget. Although it may be impossible to actually “guarantee” that a \$25,000 campaign can truly be done for \$1,000 or less, when you attend this workshop you’ll get the biggest bang for your marketing bucks! You will walk away with proven tactics and strategies that will not only stretch your marketing budget, but enhance your marketing quality as well! As a CU marketing executive, Arnold gives key points on how to do the most with your marketing budget. This session covers:

- Marketing on a shoestring budget
- Becoming involved in community events
- Using public relations to enhance marketing
- Making a case for more marketing dollars



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## BRANDING & MARKETING

### Media Buying or Media Madness?

Everyone knows the Internet is growing at a rapid pace and is considered the “new media.” However traditional media, such as newspaper, radio, television, outdoor and direct mail are far from dead. In fact, these communication channels are more important than ever in reaching your target audiences. To successfully conduct a campaign using traditional media, you must know how best to buy it. As a credit union marketing executive, Arnold gives key points on how to manage this key function. This session covers:

- Knowing the basics
- Pros and cons of different media
- Measuring effectiveness and results
- Media buying tips

### Stick To It—Building Loyalty With Members Through Relationship Pricing

Because everyone wants your members, you must fight to keep them loyal to the credit union. One way to do so is to offer relationship pricing. As a marketing executive and author, Arnold provides thoughtful insights for credit unions to consider. This session covers:

- Relationship pricing overview
- Establishing relationships with your members
- Tactics for implementing relationship pricing
- Resources required for relationship pricing

### How To Write Great Copy: Tips for Snappy Advertising

Successful marketing requires successful writing. However, writing great copy is sometimes a laborious task. Take the drudgery out of writing by learning secrets to great copy. Attendees will learn practical tips to help improve your ads, flyers, web sites, brochures and other printed material. As a credit union marketing executive and winner of multiple communication awards, Arnold provides insights to this critical marketing function. This session covers:

- 10 Keys to Writing Copy that Sells
- 5 Steps to Testing Effective Writing
- Ways to Capture Attention



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### TECHNOLOGY

#### Social Media Made Simple

Blogs. Facebook. Twitter. YouTube. Flickr. MySpace. Web 2.0. It's enough to make anyone's head spin. But understanding and using social media effectively is a key strategy for credit unions connecting with their members. This session covers everything you need to know about social media: from the basic to the advanced. Social media is not about using all the new toys to be hip, but rather about engaging your members. As a marketing executive and author of two blogs, Arnold provides thoughtful insights for credit unions to consider. This session covers:

- Social media overview
- Using social media to reach members
- Incorporating social media into marketing and strategic plans
- Social media tips and tactics

#### eMerging Technologies & Mobile Marketing

IM. Live chat. Text alerts. Social networking. Viral marketing. Blogs. Podcasting. Are these emerging technology marketing trends or just the latest fads that will fade away? As the marketing and technology fields merge, marketing executives must have a firm grasp on the latest technologies and how to best use them to reach their members. As an award-winning marketing executive and author, Arnold provides thoughtful insights for credit unions to consider. This session will cover:

- Technology strategies and trends
- eMerging technologies
- Benefits & best practices
- Implementation tactics

#### Star Wars For Your Credit Union: Technology Strategy & Planning

With the dawn of the 21st century, credit unions can no longer wait to embrace technology. How can credit unions incorporate technology? As a credit union technology executive, Arnold provides information on how your credit union can brace itself for the rapid pace of technological changes. This topic covers:

- How to assess your technological needs
- Technology planning tips
- Technology plan basics
- Upcoming trends



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## TECHNOLOGY

### Excelling With E-Commerce: Electronic Marketing

Too many credit union officials think of marketing as direct mail, advertising and newsletters. Technology has changed the way credit union officials can reach their members. As a marketing executive, Arnold shares ideas to market products and services using technology. This topic covers:

- E-mail marketing
- Using the Web to reach your members
- Ditching mass marketing

## STRATEGY

### Developing the Ultimate Strategic Plan

Successful credit unions have sharp strategic plans. Organizations that consistently plan well enjoy success more frequently. As author Jim Collins notes in his book *Good to Great*, "good is the enemy of great." Ultimate strategic planning sessions focus on how to ensure your credit union does not settle for good, but strives to be great. This session covers:

- The strategic funnel
- How to put zing into your planning sessions
- The magic ingredient to the ultimate strategic plan
- Tips for improving your strategic plan

### Developing A Vision: Strategic Marketing & Planning

Newsletters. Inserts. Brochures. Direct Mail. That's all that is involved with credit union marketing. NOT! While that may have been the case 10 years ago, credit union marketing now requires advanced applications. For credit unions to successfully compete in today's competitive environment, they must have a clear vision and a strong plan. They must have strategic marketing and planning. As a credit union marketing executive, Arnold provides hands on instruction for planning your marketing efforts. This session covers the following points:

- Strategic marketing planning
- Implementing the marketing plan & measuring performance
- Writing a credit union marketing plan



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## STRATEGY

### Running Effective Board Meetings

Many board members report that meetings are too long, waste time and achieve nothing. However, if planned and conducted properly board meetings can be meaningful. As senior vice president for Neighborhood Credit Union, Arnold helps CUs examine their board and its meetings. This session covers:

- Board packets and agenda
- Board chairman and committees
- Board self-assessment
- Ten steps to an effective board meeting

### Jumping The Shark—Has Your Credit Union Reached Its Defining Moment?

It's a moment. A defining moment when you know that your favorite television program has reached its peak. The instant that you know from now on...it's all downhill. Some call it the climax. We call it the jumping the shark (like when Fonzie jumped the shark on Happy Days). As senior vice president for Neighborhood Credit Union, Arnold helps credit unions examine their organization. This session covers:

- Where your credit union is in an organizational cycle
- Has your credit union "jumped the shark?"
- How can your credit union avoid "jumping the shark?"

## GENERATIONS

### Pearl Harbor or Pearl Jam? Marketing Across The Generations

Rotary phones. Touch-tone phones. Cell phones. Each generation identifies itself with unique cultural images. Consumers active in today's marketplace can also be divided into four distinct groups: Matures, Baby Boomers, Xers and Dot Comers. Your willingness and adaptability as an aggressive marketer will determine how successful you are in reaching and bridging these critical age ranges. As a credit union marketing executive, Arnold gives key points on how to conduct generational marketing. This session provides:

- An overview of Matures, Baby Boomers, Generation X and Generation Y
- Practical ways credit unions can market to each generation
- Financial products each generation finds appealing



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## GENERATIONS

### Why Y: Strategies To Reach The Dot-Com Generation

"Never trust anyone over 30." If that popular movie line is correct, how can credit unions reach anyone under 30? For credit unions to survive in the future, they must successfully market to the 18-35 year old age segment. Arnold presents information about one of the most misunderstood groups of people: the Dot-Com Generation. This session provides:

- An overview of the Dot-Com Generation
- Practical ways credit unions can market to Dot-Comers
- Financial products Dot-Comers find appealing

### Earrings or Noserings? Connecting with Different Generations on the Front Line

Rotary phones. Touch-tone phones. Cell phones. Smart phones. Each generation identifies itself with unique cultural images. But what happens when different generations meet on the front lines? Credit unions often have front line staff from one generation trying to connect and cross-sell to a member from another generation. A credit union staff's willingness to understand and bridge the different generations will increase your front lines service and selling success. This session covers:

- An overview of Matures, Baby Boomers, Generation X and Generation Y
- Using social media to reach members
- Service and selling tips for different generations
- Talking points to uniquely service and sell to each generation

### When Employees Act Their Age: Generational Differences in the Workplace

Work as duty. Work as means to leisure. Work as a challenge. Different generations approach employment differently. Employees active in today's labor market are divided into four distinct groups: Matures, Baby Boomers, Xers and Dot Com Generation. Your willingness and adaptability as a progressive supervisor will determine how successful you are in managing and bridging these critical age ranges. As a manager of multiple generations, Arnold gives critical points on how to better work with each unique group. This session provides:

- An overview of Matures, Baby Boomers and Generations X and Y
- Making the work environment appealing to different generations
- Supervising various generations
- Creating intergenerational



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## GENERATIONS

### Xasperating to Xillerating (How To Work With Generations X & Y)

"I don't understand my Xer employees," is a refrain heard often among credit union officials. Relating better to GenX employees helps credit unions improve their productivity. This session offers:

- An overview of Generations X and Y
- Making the work environment appealing to Generations X and Y
- Supervising Generations X and Y

## PERSONAL GROWTH AND LEADERSHIP

### Think Huge: How to Elevate Your Life and Your Credit Union

In late 2002, owners of the different looking casual shoes "Crocs" sold about 1,000 pairs of shoes over one weekend. When sharing their idea with a new business partner, he had two words for them: "think huge." Just four years later, Crocs were selling over 6 million pairs of shoes per year. How did they go from 1,000 to six million pairs: they thought huge. How do you build a successful career and life: you think huge.

This session provides:

- Think vision
- Think passion
- Think people
- Think learning

As a motivational speaker, Arnold provides insights from his adventures climbing the tallest peak in the continental United States (Mt. Whitney) and running marathons.

### Transformational Leadership: Going From Managers to Leaders/Mentors

"Everything rises and falls on leadership," writes author John Maxwell. The challenge for many credit unions, however, is that too many supervisors are managers and not leaders. Whether it is a teller supervisor, branch manager, vice president or even "chief," all organizations need not just managers but leaders/mentors. As a credit union executive, Arnold gives practical ideas on how to transform business managers into leaders/mentors.

This session offers the following:

- The difference between managers and leaders/mentors
- Staff development techniques
- Cultivating your staff's strengths
- Mentoring tips and tactics
- Creating a mentoring culture



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