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Marked For Success

Ideas to Help Your Financial Institution Succeed from On The Mark Strategies

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Going the Extra 10 Miles To Live the Brand

Financial institutions talk all the time about their brands, but we all know talking and doing are two different things. You can't just talk about your financial institution's brand. You have to live the [brand](#) every single day.

Deer Valley Credit Union in Arizona, an On The Mark Strategies client, does an exemplary job of living its brand daily, going so far as making an occasional house call. Recently, two of its employees drove 10 miles to a member's house to help her register for online banking when tech support by phone didn't work. They spent about an hour at the member's house fixing technical issues, then gave her a quick tutorial.

"We helped her register, showed her how to navigate online banking and bill pay and how to check and save her e-Statements. In the end, she gave two thumbs up," said Systems Administrator Charles Redondo,

"This is not the first time I went to a member's home to assist them with computer issues," said Project Manager Tina Jones. "The issue is usually extreme and it's not too often, but it is rewarding when all the issues are resolved. So far they have all been resolved. Fingers crossed going forward."

How can your financial institution go the extra mile (or 10) to live your brand daily? Here are some examples from Deer Valley.

Help, even when it's not your job

Branch employee Donna Howard spent several hours on the phone with Social Security and the U.S. Postal Service to ensure that a member would receive her late husband's monthly social security check.

Listen for clues

Employees Trish and Erin captured \$156,000 in new loans from the same member in one visit. He mentioned in passing how he wished he could get all three of his motorcycle loans under one big loan. They made it happen and refinanced his auto loans, too, all because Trish was listening for clues while processing his loan payment. He left very happy.

Treat internal employees like your members

"Our Marketing VP, Mark Trumpp is always on top of things and consistently asks if we

need anything on the front line. Whether it's for a promotion we are running, a member request or questions about anything, he's always prepared and ready to help with a smile," said Member Service Representative Bridget Barone.

Your financial institution's people should be more than employees. They should be brand ambassadors trained and empowered to do what it takes to live the brand every day.

Deer Valley is a member of our monthly Brand Ambassador program. [Contact Mark Arnold](#) for details.

Speaking Engagement

"Taylor (On the Mark Strategies communications director) is low maintenance, easy to work with, quick to respond and willing to be flexible. Organizations can know they will learn from him and understand his information." "

- Julianne Talley, Director of Conferences, League of Southeastern Credit Unions

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