

Conference Information

Audience:

This conference is designed for chief marketing officers, marketing directors and professionals, sales managers, retail and business bankers and personal financial services executives, as well as CEO'S from institutions of all sizes.

Cost: \$450.00 - Members \$650.00 - Non Members

Hotel: Morgantown Marriott at Waterfront Place

Register: <http://www.wvbankers.org/RBMConference>

Cancellation Policy:

Full refund on or before 10/10/17

\$75 cancellation fee after 10/10/17

No refunds on or after 10/17/17 or for no-shows.

Substitutions welcome.

Consent to Use of Photographic Images: Registration and attendance at, or participation in, WVBA meetings and other activities constitutes an agreement by the registrant to the WVBA's use and distribution (both now and in the future) of the registrant or attendee's image or voice in photographs, video- tapes, electronic reproductions and audiotapes of such events and activities.

Sponsored by:



AGENDA

October 24th

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|------------------|---|
| 8:30-9:00 a.m. | Registration Continental Breakfast |
| 9:00-9:15 a.m. | Welcome & Announcements |
| 9:15-10:45 a.m. | Finding the Digital Customer Experience for People with Disabilities Part 1 |
| 10:45-11:00 a.m. | Networking Break |
| 11:00-12:00 p.m. | Finding the Digital Customer Experience for People with Disabilities Part 2 |
| 12:00-1:00 p.m. | Lunch |
| 1:00-1:45 p.m. | West Virginia Forward - Advancing Our State into Prosperity Through Economic Development |
| 1:45-2:00 p.m. | Networking Break |
| 2:00-3:30 p.m. | CRA and Your Bank |
| 3:30-3:45 p.m. | Networking Break |
| 3:45-4:45 p.m. | Keynote - Changing Perception Through the Power of a Strong Brand |
| 5:00-6:00 p.m. | Cocktail Reception **Dinner on your own** |

October 25th

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|--------------------|---|
| 8:30-9:00 a.m. | Registration Continental Breakfast |
| 9:00-10:00 a.m. | Keynote - The New Realities: The Three Shifts Today's Bankers Can't Afford to Ignore |
| 10:00-10:15 a.m. | Networking Break |
| 10:15 - 11:15 a.m. | Bank Website Redesign |
| 11:15-12:15 p.m. | Meet Gen Z. Forget Everything You Know About Millennials |
| 12:15-1:00 p.m. | Lunch |
| 1:00-2:00 p.m. | Block Chain Technology - Retail Banking is at a Fork in the Road |
| 2:00-2:15 p.m. | Networking Break |
| 2:15-3:15 p.m. | The Power of Your Village: Why Effective Community Relations are Critical to Your Bank Marketing |
| 3:15-5:15 p.m. | Limited Breakout Session: LinkedIn Social Lab |

Finding the Digital Customer Experience for People with Disabilities



**The Hon. Katherine McCary,
DC Metro Business Leadership
Network - Owner, C5 Consulting**



**Eduardo Meza-Etienne,
Director of Compliance
eSSENTIALAccessibility**

Businesses today are seeking ways to tap into the market of the disability community – the largest and fastest growing diversity dimension in the US with more than \$3 trillion spending power of which is \$220 billion discretionary spending. Companies including Nordstrom, Starbucks, Marriott and others in the retail industry are leading the way. Financial Services institutions like SunTrust Bank, Wells Fargo and Bank of America, along with a variety of mid-sized and community banks, have begun initiatives focused on both this diverse talent pipeline and the marketplace.

Katherine founded C5 Consulting, LLC, in May 2011 after 21 years at SunTrust Bank, Inc. as its Chief Disability Officer, where her primary responsibility was developing and leading corporate disability initiatives and creation of fifteen disability ERGs within the bank’s Diversity Councils. Her work at SunTrust began (following a successful fifteen-year career in the staffing industry) with the creation of a community outreach initiative, “Accessing Community Talent” which supported the bank’s desire to support underserved populations through employment opportunities. Recognizing the often under-tapped talent of individuals with disabilities, she initiated a pilot pro-

gram, “Put Ability to Work” that resulted in receipt of the SHRM HR Magazine 2000 Innovative Practice Award, the first of many awards for the bank and which brought disability to the forefront for senior leadership.

Eduardo, a brain injury survivor, has been involved in the accessibility and disabilities field for 20 years working for numerous government agencies and small contractors in the Washington, DC metropolitan area supporting people with disabilities. He is an advocate for individuals with disabilities and his competencies include a strong sales and business development background in both the private and public sectors. He supports organizations in their efforts to promote digital accessibility, diversity and inclusion.

He is a skilled technologist and strategist, specializing in international accessibility trends, assistive technologies, legal mandates and social media. Eduardo has served on the Board of Directors of the D.C. Metro Business Leadership Network since 2009, and assists as their Webmaster and Social Media expert.

Conference Sponsor



CRA and Your Bank



Thomas Stokes
Community Affairs Officer
FDIC



Laura Rye
Community Investment
Relationship Manager
FHLBank Pittsburgh

Thomas is the Community Affairs Officer of the Atlanta Region of the Division of Depositor and Consumer Protection (“DCP”) of the Federal Deposit Insurance Corporation (“FDIC”). The Region includes the states of Alabama, Florida, Georgia, North Carolina, South Carolina, Virginia, and West Virginia; he is responsible for the administration and management of its community outreach, financial education and technical assistance activities.

Laura has been with FHLBank of Pittsburgh since 2006. FHLBank Pittsburgh is a congressionally chartered cooperative of local financial institutions operating across Delaware, Pennsylvania and West Virginia. The Bank uses private money to assure the flow of credit and services to local lenders and assists them in serving the affordable housing and community and economic development needs of the communities in which they operate.

In the Community Investment Department, Laura travels throughout West Virginia and Western Pennsylvania to work with members and their communities as they access FHLBank products to advance housing, business, and community projects.

Tuesday - Keynote:

Changing Perception through the Power of a Strong Brand

Sharon Martin
Vice President for
University Relations
West Virginia University



With more than 25 years in the communications and marketing arena, **Sharon Martin** is the vice president for University Relations at West Virginia University.

She oversees executive communication, internal and external communication, strategic marketing and messaging, brand and creative development, trademarks and licensing, and the Visitors Center.

Prior to her arrival at WVU in October 2013, Martin served as assistant vice president of marketing at Purdue University. Her career also includes owning a boutique marketing and communication agency, where she co-founded a local women’s bi-monthly magazine. Martin also worked for the Purdue Alumni Association for 13 years, ultimately serving as director of communications and editor of the bi-monthly magazine.

Martin has served on the boards of several professional associations including National Mortar Board, Association of Women in Communications, the American Marketing Association and the American Cancer Society.

Wednesday - Keynote The New Realities - Three Communication Shifts Today's Financial Leaders Can't Afford to Ignore



Morgan Mulgrew
Mindset Digital

The challenge today is no longer getting your message out. There are more channels than ever: blogs, Twitter, Instagram—the list goes on. The real challenge for your organization is getting your message in—getting your hyper-distracted audience to take time to engage with you.

So what works? In this time of short attention spans and high expectations, this high-impact, high energy session demonstrates how to more effectively communicate and connect in a digital age.

We'll examine how to:

- break through the noise and build strong connections with clients and colleagues
- leverage the latest visual storytelling techniques
- write and present in powerful new ways that wow a crowd
- build your personal brand
- discover not just what's now but what's next

As a trainer with the cutting edge firm Mindset Digital, **Morgan Mulgrew** coaches industry leaders on the latest digital and social media approaches. An experienced educator, Morgan travels the country leading training sessions on digital plat-

forms, and helping leaders, marketers and sales teams in Fortune 100 firms get up to speed on the latest technologies.

In addition to leading workshops and keynotes, Morgan works with a creative team at Mindset Digital who design online training courses and certifications in Twitter, LinkedIn, Facebook, SEO, digital advertising, mobile trends and visual storytelling.

Bank Website Redesign



Lauren Hendricks
United Bankshares, Inc.

Lauren Hendricks is the Marketing and Communications Manager for United Bankshares, Inc., a \$19 billion financial holding company with 144 full service banking locations in Virginia, Washington, DC, West Virginia, and several other mid-Atlantic states. Lauren leads a talented and diverse team that, together, have spent the last several years refreshing and refining their company's longstanding, historic brand. As a company deeply committed to the communities it serves, Lauren's team is also responsible for its volunteer, philanthropic and financial literacy initiatives.

Conference Sponsor



GuardianBridge

The Power of Your Village: Why an Effective Community Relations Program is Critical to Your Bank Marketing Strategy



Aly Goodwin Gregg
Managing Director
GuardianBridge, LLC

There is a documented strategy impact for every component of your bank's marketing activity. Community relations should be no exception. In this session, Aly will examine the changing role of marketing and share insights on how community banks throughout the country are creating effective brands through unique engagement with their audiences, and augmenting those relationships through content development and storytelling to truly maximize the power of their village.

Aly is Managing Director for GuardianBridge, a boutique business services firm that supports the complex needs of business leaders and their teams to develop and implement strategies, plans, and programs to ensure business success. An award-winning communicator, Aly also serves as Managing Partner for Bank Partnership, an initiative of GuardianBridge, which provides programs and solutions to specifically help community banks, and small to medium-size regional banks, manage communications, regulatory examination risks and preparation to deliver strong results for clients and stakeholders. She can be reached at AGregg@GuardianBridge.com or (304)-549-5092.

Blockchain Technology- Retail Banking is at a Fork in the Road



Dustin O. Davies
Chief Technology Officer
Spilman Thomas & Battle



Nicholas P. Mooney, II
Member
Spilman Thomas & Battle

This presentation will discuss the basics of blockchain technology, from its use in recording transactions for cryptocurrencies such as Bitcoin to the many potentials for use by industries to deliver existing services more quickly and cost-effectively, as well as novel and unique services that are emerging. Retail banking is at a fork in the road.

Dustin is responsible for envisioning, planning, establishing and maintaining technical systems and technical operations. He has executive experience in technology management in both the public and private sector. Mr. Davies is well-versed in systems management, systems development, IT risk management and analysis, budgets and reporting.

Nicholas's primary area of practice is consumer financial services litigation in federal and state courts. He has devoted all of his time for the past 16 years to that practice area. In the past, he also has practiced energy law and general litigation.

Meet Gen Z. Forget Everything You Know About Millennials



Michael F. Walsh

**Associate Professor of Marketing
College of Business & Economics,
West Virginia University**

Generation Z is the demographic cohort after the Millennials. There are no precise dates for when Generation Z starts or ends; demographers and researchers typically use the mid-1990s to the mid-2000s. In this informative presentation, WVU Marketing Professor will discuss the newest generation cohort and their emerging consumption habits.

Mike is an associate professor of marketing at the College of Business and Economics at West Virginia University. He teaches courses at the graduate level as well as undergraduate. His research interests include consumer behavior issues such as consumer resistance to change and professional services marketing. He joined the faculty in January, 2006.

Prior to his move to academia, Dr. Walsh spent over 25 years in general management, marketing and advertising. Mike oversaw Buchanan Ingersoll's marketing activities covering 350 lawyers in 13 cities and across five states. Buchanan Ingersoll is a top law firm based in Pittsburgh PA. He formerly was Senior Vice President and Director of Operations and Finance for Ketchum Advertising in Pittsburgh. During his career at Ketchum, Mike focused on specialized international marketing communication strategies in business to business, high

technology and consumer marketing communications.

In addition to his academic responsibilities, Mike has consulted with a number of firms and organizations on marketing and general management issues. These clients include: Charleston Newspapers, Inc., Medicaid of West Virginia, Spilman Thomas Battle, UPMC, Reed Smith, Western Pennsylvania Hemophilia Association, Sercuracomm (national security consultancy based in Pittsburgh) and the Association for Directory Marketing (national trade association based in Pittsburgh).

West Virginia Forward



Speaker TBD

West Virginia Forward is a collaboration between West Virginia University, the West Virginia Department of Commerce and Marshall University to identify short-term, larger-scale projects that will boost West Virginia's economic development efforts.

The state is in a transition economy. Our communities are struggling while jobs have disappeared. Our talent has been forced to leave the state they love to pursue opportunity. We need to embrace all that West Virginia has to offer and believe that we can create a new path forward. It is not about rising from the bottom of a poll or stat. It's about moving West Virginia Forward.



If you got on LinkedIn a long time ago, it's time to rethink how you're leveraging the world's most powerful professional platform. Banking leaders with fully optimized LinkedIn profiles have 40 times more opportunities, and LinkedIn is increasingly critical in the banking industry.

A Mindset Digital LinkedIn Specialist will host a two-hour coaching lab, providing 1:1 coaching to attendees.

Coaching tips will include how to:

- write an effective, personable summary
- use keywords for search visibility
- stand out from the crowd and amplify your professional brand
- add content to your profile to drive traffic and increase your credibility
- discover and connect with potential clients
- find and improve your Social Selling Index score

- Angie Zirk** - Summit Community Bank
- Clint McCabe** - Clear Mountain Bank
- Kathy Leombruno** - Citizens Bank of West Virginia
- Lauren Hendricks** - United Bank
- Leland Steel** - Premier Financial Bancorp Inc.
- Aly Goodwin Gregg** - GuardianBridge, LLC

A giant thank you to the members of the WVBA Marketing Task Force!

Members of the Task Force suggested the topics, speakers and venue for our inaugural Retail Banking and Marketing Conference.

Hotel Information



Book Your Room at the Marriott Waterfront Place Now!

Participants are responsible for booking hotel accommodations by contacting the Morgantown Marriott at Waterfront Place (304) 296-1700, or by using our [web link](#). We have reserved rooms for this event. When you call to book your room please refer to the “WV Bankers Association Marketing Conference”. We have negotiated a special rate of \$134.00 per night. This rate is good through **October 11, 2017. Don't delay, book today!**

Retail Banking & Marketing Conference
October 24-25, 2017
Marriott at Waterfront Place
Morgantown, WV

Who should Attend

Chief marketing officers, marketing directors and professionals, sales managers, retail and business bankers, personal financial services executives and CEO's from institutions of all sizes.

Applied for CPE
Credit Hours with the
WV Board of Accountancy

Registration - 8:30 am
Both Days - 9:00 am to 5:00 pm

Business
Casual Dress

Location: Morgantown Marriott at Waterfront Place, Two Waterfront Place, Morgantown, WV 26501
Venue Phone: 304-296-1700

Registration Cost

(Includes continental breakfast, lunch both days and opening night reception)

- \$450.00 WVBA Member
- \$650.00 Non-Member

Cancellation Policy (Substitutions Welcome)
Full refund on or before 10/10/17
\$75.00 Cancellation fee after 10/10/17
No refunds on or after 10/17/17 or for no-shows.

Register and pay online at www.wvbankers.org/RBMConference
Registration may also be emailed to dharman@wvbankers.org or faxed to 304-343-9749.
Please make checks payable to the WV Bankers Association and mail to: WV Bankers Association, 3601 MacCorkle Ave. SE, Suite 100, Charleston, WV 25304

Questions? Phone 304-343-8838 or 800-343-8038

Name/Title: _____

Bank: _____

Address: _____

City, State, Zip: _____

Phone: _____

Email: _____

Cell Phone: (In the event we must reach you outside of business hours): _____

I want to participate in the 1:1 LinkedIn Lab Coaching session

Consent to Use of Photographic Images

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