

Stop being a banking commodity—
engage customers, members and employees.



JEFF STEPHENS BANKING ENTREPRENEUR, INNOVATOR AND CONSULTANT

JEFF STEPHENS is founder and CEO of CBC and PSST! Word of Mouth Marketing for Banks and Credit Unions. A popular financial services industry blogger, speaker and writer, Jeff is a noted thought leader on topics related to financial services innovation, branding and marketing. Prior to founding his companies, Jeff worked for Umpqua Bank, arguably the nation's most innovative community banking brand. Today, his companies consult with banks and credit unions across the country, helping them break free from the confines of being commodities, by engaging customers, members and employees. Jeff leaves his audiences energized, enlightened and informed--pondering new paradigms the banking industry has never considered.

SAMPLE JEFF'S IDEAS

www.jeff-stephens.com

<http://psstmarketing.wordpress.com>

www.creative-brand.com/blog

[Twitter.com/jeff_stephens](https://twitter.com/jeff_stephens)

TESTIMONIALS

"I book a lot of speakers, and Jeff's content is completely unique from others'. He provides attendees a fresh new paradigm about how to be competitive, and walks the audience step-by-step through the process of developing a powerful brand that will help them compete as well as possible."

--Trish Patterson, Tennessee Credit Union League

"Jeff was so awesome! I have already spoken with him about coming to our credit union to duplicate his class for my entire staff and board. His session was by far the best I have attended in at least three years! Bring him back every chance you get!"

--Attendee, CUNA Marketing Management School

INVITE JEFF STEPHENS TO YOUR EVENT

For information on speaking fees or to book a presentation from Jeff Stephens at your event, contact CBC at speaking@creative-brand.com or 503-249-9363 | www.creative-brand.com/speaking



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2011 PRESENTATION TOPICS

DECOMMODITIZING FINANCIAL SERVICES

Based on Jeff's popular white paper, The Decommoditization Manifesto

Let's face it: financial services have become a commodity. Checking accounts, auto loans, mortgages are a dime a dozen, which has created a nation of price-driven consumers. So how is a bank or a credit union supposed to compete? The answer is to break free from being a commodity—giving customers a reason beyond products, services and rates to choose the bank or credit union. This bold presentation challenges conventional thinking and presents new paradigms for the future of the financial industry.

Tangible Learning Objectives

- Learn how to stop being a commodity
- Learn the truth about differentiation and why it's important
- Learn how to determine your ideal customers and get more of them

THE BRANDING TRANSFORMATION

Each year, dozens of banks and credit unions “rebrand.” Unfortunately, these efforts are often purely cosmetic changes—a new name, new logo, or a new website. But what successful companies know is that branding is a transformative process that impacts internal culture, human resources, operations, training, facilities, marketing and much more. In this presentation, Jeff will share his extensive experience guiding banks and credit unions through the process of transforming their companies from their old selves to the new.

Tangible Learning Objectives

- Learn what true branding really means
- Discover how to find your brand
- Learn how to demonstrate your brand with your actions, not just your words—company-wide
- Learn how to introduce your new brand presence to the market

CREATING THE BUZZWORTHY FINANCIAL INSTITUTION: WORD OF MOUTH FOR BANKS AND CREDIT UNIONS

Word of mouth marketing is the oldest and most powerful form of marketing—yet financial institutions have never learned to harness it. In a commoditized environment with tightening budgets, word of mouth is more important than ever. That's why Jeff Stephens launched PSST!, the world's first word of mouth marketing consultancy exclusively for banks and credit unions. Jeff will open the audience's eyes and mind to the power of word of mouth marketing.

Tangible Learning Objectives

- Learn the principles of word of mouth marketing
- Learn why word of mouth is more effective than traditional media
- Learn the steps for creating a word of mouth marketing program
- See examples of how others have succeeded with word of mouth



WORD OF MOUTH MARKETING
FOR FINANCIAL INSTITUTIONS

