



Guide to Partnering with Creative Brand Communications

Over the years, we've found that great partnerships are extremely valuable and beneficial to our partners, to CBC, and to our clients—in several key ways. Both CBC and our partner companies are able to:

- Expand our list of capabilities
- Enhance our credibility through association with another credible company
- Generate referrals from high-quality prospects—effectively expand our sales forces
- And of course, ultimately, win more business

Following is an overview of how CBC works with our partners. This document assumes you're already familiar with CBC's capabilities and services, and have read our website in depth.

“Fit”: Business Alignment

In order to have a successful partnership of any type, it's critical that our firms have a good “fit,” and are aligned in a) our philosophies about how banks and credit unions can be successful in the financial services industry, and b) our overall approach to doing business.

Philosophies

We believe any bank or credit union's biggest competitor is not another bank or credit union—it's apathy. Americans care about nothing more than their money, yet nothing less than their financial institution. To consumers, financial institutions are interchangeable commodities. Our primary goal at CBC is to help banks and credit unions break free from being commodities. Based on our philosophies, the only way to do that is to create a truly distinct and polarizing brand, and then attract consumers and employees for which that brand is engaging. We believe a strong financial brand should polarize consumers like any other strong brand (such as Apple, Harley-Davidson, etc.), resulting in people who strongly like the brand, and others who strongly feel it's not for them.

For more samplings of our philosophies, please be sure to read the following items available on our website:

- The De commoditization Manifesto
- Finding, Telling and Proving the Story

Approach to Doing Business

At CBC, we sell our expertise—not our time. Our business strategy is to have expertise so narrow, deep and niched that we literally have no competition. Our one and only expertise is in helping banks and credit unions create a company that's worth customers, members and employees giving a damn about. That's it.



Metaphorically, many firms approach business as if they are restaurant waiters, and their clients are the diners—in other words, they act as order takers and are fearful of not delivering exactly what the customer asked for. At CBC, we act more like doctors, and treat our customers as patients. We are the experts, they have ailments, and it's our job to diagnose and prescribe them a solution. We don't let them walk into our office and prescribe their own medication. If they don't like this approach or feel they can get the same product elsewhere for less money, they are welcome to leave and give it a shot.

To further understand how we approach business and the expectations we set with our clients, please be sure to read our "New Client Orientation Guide."

Types of Partnership

There are multiple forms a partnership with Creative Brand Communications can take:

- Invitation to Collaborate
- Referral to Sales Prospect
- Co-Propose
- Alliance and Co-Marketing

Invitation to Collaborate

Many of CBC's most successful partnerships to-date have been "Invitations to Collaborate," in which one company already doing business with a client invites the other to provide complementary services. For instance, if CBC is already engaged with Client X and sees the opportunity to invite your company to provide your relevant services to Client X, CBC would make the "Invitation to Collaborate."

In this case, both you and CBC do simultaneous business with the client, and the client benefits from a streamlined experience because the two companies are familiar with each other's processes and are generally in-sync.

Referral to Sales Prospect

A "Referral to Sales Prospect" is a standard business referral. If CBC encounters a company who could benefit from your firm's services, CBC will be happy to make the introduction and encourage the company to do business with your firm. In this case, CBC is typically not currently engaged in work with the client.

Co-Propose

Sometimes your firm and CBC have the best chance at getting new business if we co-propose on an engagement. In this case, we develop and deliver a joint proposal, and the prospective client understands it's a "package deal"--they hire us both, or neither of us. When we win the business, both our firms contract separately with the client, but our work intertwines and happens mostly simultaneously.

Alliance and Co-Marketing

Forming an alliance is the deepest and most formal means of collaborating—our firms get "in bed" with each other. An alliance is the equivalent of saying "For XYZ services, CBC works



exclusively with [Your Firm]," and vice versa. We may choose to co-market or co-brand products and services, and share revenue on those ventures.

Compensation

We believe it's overly simplistic to ask the question "does CBC pay for referrals, and expect payment for the referrals it makes?" Partnerships provide compensation to the partners in many ways, both financial and non. As mentioned at the beginning, both companies are compensated intangibly for the partnership in the form of enhanced credibility, an expanded sales force, and an increased capabilities list.

Financially, partnerships are structured on a case-by-case basis. The default structure, unless otherwise discussed and agreed, is free of financial compensation. Why? Because while we are open to financial arrangements, we believe a strong partnership is one in which both firms feel the other firm adds so much unique, unmatched value to the relationship that there is no alternative to the partnership. In other words, our goal is that CBC's narrow and deep niche expertise and commitment to the partnership is so rare and incomparable that there aren't even any other options you would want to turn to...even if you could find them. And we would expect the same of you.

Training

Once our firms decide to work together, we need to become well versed in the other company's products, services, approach and key sales messages. That way, we can represent each other as accurately and effectively as possible during our sales efforts. CBC prefers establishing a mutual, structured, methodical training program over the course of 1-2 months to train each other's key representatives—either in-person or via phone and web, depending on the nature of the partnership.

Next Steps

If developing a partnership with CBC sounds like it would be mutually beneficial, let's schedule a conversation to discuss and evaluate it. In our conversation, we will focus on evaluating "fit" (i.e. Business Alignment) first and foremost. If the fit seems strong, we can continue the conversation to explore the types of opportunities that are most likely to arise, and consequently which form of partnership might be most appropriate. Ultimately, we will work together to craft a proactive plan for promoting our partnership and getting the most from it.

To begin the discussion, please contact CBC CEO Jeff Stephens at jeff@creative-brand.com or 503-249-9363.