

Sales and Marketing Roundtable

October 18 & October 19, 2022



Why are we here:

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- The purpose of the roundtable discussion is to collaborate; sharing success and challenges, understanding how network peers' approach and adapt to different situations.
- Topics are introduced by attendees to sculpt our discussions as they relate to current industry experiences.
 - Bring your “A” game
 - It’s not personal
 - What’s your takeaway?
 - How can the people around you help you accomplish your next goal or vision?

Setting the Stage

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- What do you want to learn from your peers today?
- What are your top initiatives and the priority of each?
 - What have you already started (or completed) or plan to start soon?
 - Anything you want to focus on/launch, but haven't been able to yet?
 - What's holding you back?
- How can the people in this room help you meet these initiatives?
- As a collaborative, and with Xtend's resources, what can we build together?
- How might Xtend align our priorities with your initiatives?

Tuesday Agenda

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Time Slot	Topic/Focus
9:00am – 9:30am	Introductions of Xtend's staff and attendees Overview of Agenda & Discussion topics
9:30am – 12:30pm	Start of Sales and Marketing Roundtable Discussion
12:30pm – 1:00pm	Lunch Break/Tour
1:00pm – 1:15pm	Virtual Attendance Begins, Introductions and Overview
1:15pm – 3:45pm	Continue Sales and Marketing Roundtable Discussion
3:45pm – 4:00pm	Wrap Up and closing comments

Wednesday Agenda

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Time Slot	Presenter	Topic/Focus
9:00am – 9:30am		Introductions of Xtend's staff and attendees Overview of Agenda & Discussion topics
9:30am – 10:45am	Sarah Ashby Business Intelligence Manger	Xtend Data Analytics
10:45am – 12:00pm	Nathan Koster & Dan Deitsch Assistant Manager of Communications & Project Coordinator	Recurring Communication Strategies
12:00pm – 12:30pm	Lunch Break	
12:30pm – 1:15pm	Shabana Deckinga & Vivian Colligan Media Coordinator & Creative Lead	Xtend and B2B Marketing
1:15pm – 3:00pm	Emily Ellis & Ashley Schneider Digital Project Coordinator & Assistant Manager of Communications	Digital & Campaigns
3:00pm – 3:30pm		Wrap Up and closing comments

- What are your top initiatives and priorities?
- What are the hot trends right now?
- How to increase member engagement?
- How are you prospecting for new members?
- Does anyone have any basic tips and tricks about marketing to members of a credit union?
- How to reach different demographics in your markets?
- What is working? What is your experience with targeting the right members, at the right time, with the right offers?
- How to give incentive to members to have them refer colleagues/friends to credit union, etc.?
- What are you doing to grow membership, and what are your deposit strategies?
- How can we best leverage technology to make it easier for members to interact and access their account features?
- How do you market on E-statements? Where have you used inserts in the past?
- What are the secrets to successful social media marketing, pleasing more members & reaching members on different levels?

- How do you achieve member engagement on social media?
- How do you maintain social media presence?
- Is the use of google ads part of your digital marketing strategy?
- What new audiences are you hoping to reach on social media?
- What do you think is the hardest part of being on social media?
- How would you post on social media to stay relevant but still on brand?
- How do you coordinate your social media marketing match your email marketing?
- What would you define as your digital marketing tactics?
- How are you using personal finance education or financial education to improve your digital marketing?
- What current strategy do you use to maintain member reach digitally?
- From a technology side, in what ways do you use it to improve member retention?
- How do you currently use digital banners in your marketing or campaigns?
- How are you using marketing to make a connection with your members & not just information about your services?

Key Contacts

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Thank you!

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