

VIRGINIA BANKERS ASSOCIATION

VBA COMMITTEES

VBA Marketing Committee Meeting August 29, 2023 | 10am-12pm

Join Zoom Meeting

<https://us02web.zoom.us/j/86407183808?pwd=MzYyOXZ5eGE1ck1QMjd1SDcvRE5Zdz09>

Meeting ID: 864 0718 3808

Passcode: 922089

AGENDA

- I. Welcome – Laura Wright**
- II. Guest Speakers: PWCampbell – Marshall Jett and Glenn Grau**
- III. 2024 VBA Connect | Protect Experience Discussion (March 11-13) – Kristen Reid**
 - a. Other Education & Training Updates
- IV. Financial Literacy Updates – Monica McDearmon**
- V. Roundtable Discussion – Laura Wright**
 - a. What are your specific (or new) strategies targeted to new customer acquisition (i.e. refreshing products, focusing on online account opening, lead gen tools, offers, data mining, etc.)
 - b. Website redesign:
 - i. Site designers/developers?
 - ii. Hosting (did you keep the same host)?
 - iii. Integrating your digital banking platforms?
 - iv. The pros & cons of using your core provider's products?
 - v. Any other words of wisdom?
 - c. Who is partnering with a third party to offer ERC Tax Credit service?
 - d. Who is using a third party or in-house resource to do customer data mining/data appends?
 - e. Who is using a marketing automation platform?
 - f. What are your current marketing focuses/campaigns?
 - g. What are your current challenges?
- VI. Next Meeting & Adjourn**
 - a. November 1 at the VBA office from 10am-1pm with lunch

