

# COURSE CATALOG



## ABA Bank Marketing School

**April 10-19, 2024**

Part 1: Online

Part 2: Emory Conference Center  
Atlanta, GA

## ABA Bank Marketing School



### Prepare yourself to become tomorrow's bank marketing leader at ABA Bank Marketing School.

In two immersive weeks, you'll acquire a deeper understanding of strategic marketing and how to align your campaigns with your bank's ROI, profitability and customer experience goals. Our program, taught by some of bank marketing's best, offers the latest strategies and tactics you can immediately put into action.

With this interactive and dynamic school, you'll build a lifelong career network and kick-start your journey to earning the Certified Financial Marketing Professional (CFMP) certification, the only industry-recognized designation for bank marketers.

### Where can marketing take you?

Register today and find out.

[aba.com/BMS](http://aba.com/BMS)

A blended learning format offers a virtual and in-person experience to maximize learning and collaboration.

### ABA Bank Marketing School Core Competencies



Demonstrate  
Your  
**VALUE**



Develop  
Your  
**STRATEGY**



Know  
Your  
**MARKET**



Understand  
Your  
**AUDIENCE**



Calculate  
Your  
**ROI**



**ABA  
Bank Marketing  
School**

# Daily Schedule

## WEEK 1 - ONLINE

### MONDAY April 1

1:00 PM – 2:00 PM  
**Student Orientation**

### WEDNESDAY April 10

11:00 AM – 11:15 AM  
**Welcome**

11:15 AM – 12:15 PM  
**PR/Communications I**

1:00 PM – 2:15 PM  
**Data & Analytics I**

2:30 PM – 4:00 PM  
**Marketing ROI I**

### THURSDAY April 11

11:00 AM – 12:15 PM  
**Sales & Marketing  
Alignment I**

1:00 PM – 2:00 PM  
**Banking on Multicultural  
Customers**

2:15 PM – 3:30 PM  
**Marketing Risk  
Management**

3:45 PM – 5:15 PM  
**Compliance and  
Marketing I**

*All times are in ET.*



# ABA Bank Marketing School

## Daily Schedule

### WEEK 2 - IN PERSON

#### SATURDAY April 13

5:00 PM – 6:00 PM  
Welcome and  
Team-Building Exercise

#### SUNDAY April 14

8:00 AM – 10:00 AM  
Marketing Planning I

10:15 AM – 11:30 AM  
Marketing ROI II

12:30 PM – 2:00 PM  
Marketing ROI II

2:15 PM – 4:15 PM  
Banking on  
Multicultural  
Customers

#### MONDAY April 15

8:00 AM – 10:00 AM  
Marketing Planning II

10:15 AM – 12:15 PM  
Marketing Profitability I:  
Bank Financial Analysis

1:00 PM – 3:00 PM  
Marketing  
Profitability II:  
Asset Liability  
Management

3:15 PM – 5:30 PM  
PR/Communications II

#### TUESDAY April 16

8:00 AM – 9:30 AM  
Marketing Planning III

9:45 AM – 11:45 AM  
Digital Marketing I

12:45 PM – 3:00 PM  
Digital Marketing II

3:15 PM – 5:15 PM  
Social Media Marketing

#### WEDNESDAY April 17

8:00 AM – 10:00 AM  
Data & Analytics II

10:15 AM – 12:15 PM  
Content Marketing and  
Management

1:00 PM – 3:00 PM  
AI in Action: Using  
Innovation to Drive Value  
in Bank Marketing

3:15 PM – 5:15 PM  
Current Event  
Conversation

#### THURSDAY April 18

8:00 AM – 10:15 AM  
Compliance  
and Marketing II

10:30 AM – 12:00 PM  
Sales and Marketing  
Alignment II

1:00 PM – 5:00 PM  
Student Group Exercise

#### FRIDAY April 19

8:00 AM – 10:15 AM  
Student Group  
Presentations

10:30 AM – 12:30 PM  
Effective Marketing  
Leadership

*All times are in ET.*

*Note: This list only reflects concepts covered by the program.  
Course content is subject to change.*

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NEW  
COURSE

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ABA  
Bank Marketing  
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# AI in Action: Using Innovation to Drive Value in Bank Marketing

**Instructors:** John Hanley, CFMP; Kimberley Kaschke, CFMP

Deepen your understanding of AI's role in bank marketing with this course, which breaks down complex concepts into clear, actionable insights. Explore how AI can transform customer engagement, drive data-centric marketing strategies and drive growth. Through practical, real-world applications and an interactive exercise, you'll learn to use AI tools to craft an innovative marketing pitch for your bank.

## Course Objectives:

After successfully completing this course, you will be able to:

- Understand AI/GenAI fundamentals
- Consider ethical and risk considerations for leveraging AI within your organization
- Identify various use cases within financial marketing
- Demonstrate understanding of prompt design and basic GenAI usage

## Course Content:

- What's beyond ChatGPT
- The demystification of AI/GenAI
- Benefits and use cases in banking and financial marketing
- Shifting consumer perceptions and why that matters
- Legal, compliance and ethical considerations of GenAI
- Basics of intelligent prompt design
- Hands-on practice with GenAI

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## ABA Bank Marketing School

# Banking on Multicultural Consumers

**Instructor: David Femi**

Multicultural Americans play an integral role in expenditure growth in the country. The impact of this consumer segment is central to the success of every consumer brand and financial institution in America. During this course, gain insights into how marketing to multicultural consumers can yield incredible results for your bank.


### Course Objectives:

After successfully completing this course, you will be able to:

- Understand the importance of building culturally fluent brands
- Identify best practices for planning and implementing multicultural marketing strategies
- Establish a presence within multicultural communities

### Course Content:

- The rapidly changing demographics of the country
- Making the multicultural business case internally
- Brand positioning and execution
- Embracing the new majority
- The M&T Bank multicultural growth strategy and story

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**“Great course with very practical content!  
You can tell David is very passionate about  
Multicultural Marketing.”**

— Bank Marketing School Graduate

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## ABA Bank Marketing School

# Compliance and Marketing

**Instructor: Charles LeFevre, CRCM**

Increased regulatory burden, the rapidly changing landscape of advertising and a shift away from traditional media can make compliance seem overwhelming. This course will provide students with an overview of the laws and regulations that govern a bank's advertising and market planning so they can best mitigate compliance risk at their bank. Students will learn how these laws and regulations relate to loan, deposit and nontraditional products, as well as gain practical knowledge to ensure their bank's advertising is effective and compliant when developing appropriate marketing collateral.


### Course Objectives:

After successfully completing this course, you will be able to:

- Understand the laws and regulations that govern advertising and marketing planning
- Ensure marketing collateral is effective and compliant
- Identify resources available to ensure ongoing mitigation of compliance risk

### Course Content:

- Review of laws and regulations that affect marketing departments
- Discussion of advertising trigger terms and required disclosures
- Assess compliance risks related to third parties, new product and services, and delivery channels
- Explore targeting and disparate impact allegations through case studies and advertising examples
- Understand a reasonable consumer's perspective to avoid the potential to mislead
- Resources shared will include sample forms, websites, guides for UDAAP and managing risk

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**"Charles is excellent.  
He made compliance exciting."**

— Bank Marketing School Graduate

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## ABA Bank Marketing School

# Content Marketing and Management

**Instructor: Shelly Loftin, CFMP**

This course will review how to develop a content strategy that aligns with your business goals, creates engaging and valuable content, and tracks the success of your campaigns. By the end of this course, you will be able to create a content marketing plan that drives results and can grow individual business lines of focus. Learn a proven process to generate endless story ideas as well as effectively document, plan and coordinate your content plan. You'll discover ways to research, remix and repurpose your content to make your content work harder for you.


### Course Objectives:

After successfully completing this course, you will be able to:

- Understand and apply the principles of the Content Fuel Framework
- Understand different forms of content and how they factor into content strategy
- Develop a content strategy that aligns with business goals
- Create engaging and valuable content that resonates with your target audience
- Continuously improve content marketing efforts to drive results and grow business
- Evaluate content to repurpose across marketing channels

### Course Content:

- Content idea generation tools
- Content marketing workbook template
- Content management system template
- Name, Image, Likeness (NIL) Discussion

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**“Good tools and takeaway material. It’s an exciting presentation with so much energy.**

**Love it!”**

— Bank Marketing School Graduate



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## ABA Bank Marketing School

# Data and Analytics

**Instructor: Hunter Young**

The implementation of Big Data and marketing analytics has challenged financial institutions everywhere. In this course, discover various data types that can be used to make informed decisions in both traditional and digital marketing endeavors. Learn how to extract meaningful information from data sources, use tools to derive insights from this data and how to act on discovered insights using best practices.


### Course Objectives:

After successfully completing this course, you will be able to:

- Effectively map the data at your bank
- Discover, extract, organize and describe data to support business decisions
- Forecast marketing response rates
- Scrutinize digital marketing analytics to determine campaign success and optimizations

### Course Content:

- Customer, market and digital data sources
- Data planning rubric
- Campaign performance analytics
- CPC, CPM, CPA, LTV and other orienting marketing metrics
- Demographic and behavioral segmentation approaches
- Data visualization and report development

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**“Hunter gave many ideas on how to organize the wealth of data that most of us likely have, and showed us how to structure data to get the most out of it.”**

— Bank Marketing School Graduate

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## ABA Bank Marketing School

# Digital Marketing

### Instructor: Amber Farley

Customers interact with your brand at many touchpoints, like pit stops along a journey. In this course, develop a strategic mindset to connect the dots between available digital marketing channels and the customer journey. This course provides a broad overview of the digital marketing techniques needed for successful marketing campaigns in a digital economy. Today's consumers spend most of the day online, yet marketing budgets don't always maximize that opportunity. Learn effective tactics for planning digital channel selection, maintaining a brand across the entire spectrum of engagement, applying the right channel at the right time and being resourceful with implementation and measuring success.

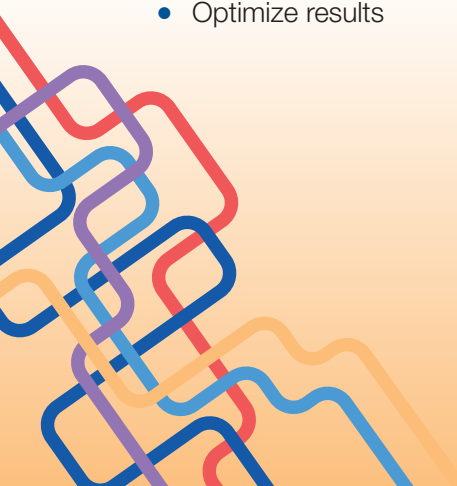
### Course Objectives:

After successfully completing this course, you will be able to:

- Develop a comprehensive digital marketing strategy
- Examine the customer journey
- Understand the importance of developing relevant content
- Select the right digital channels, tactics and platforms
- Examine the principles of design thinking using empathy, ideation and experimentation
- Understand website design best practices
- Develop KPIs, creative testing and other performance metrics
- Implement a plan across multiple channels
- Track performance through awareness, leads and conversions
- Optimize results

### Course Content

- The relationship between owned, paid and earned media
- Website planning, creation and analytics
- Design best practices for digital channels
- Geotargeting
- Search engine optimization and marketing
- Content marketing (high-level overview)
- Video, email and mobile/text marketing
- Social media (high-level overview)
- Marketing automation
- Retargeting/remarketing
- Media buying terminology and performance metrics

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**“Amber is fun and energetic.  
I have gained a wealth of knowledge to  
apply to our digital marketing plan.”**

— Bank Marketing School Graduate

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## ABA Bank Marketing School

# Effective Marketing Leadership

**Instructor: Lance Kessler, CFMP**

One of the biggest challenges facing marketers today is having a seat at the executive table. This course is designed to explore the role of marketing and how strategic leadership is essential to that role. Through interactive discussion and hands-on activities, explore how to become a stronger leader in your organization


### Course Objectives:

After successfully completing this course, you will be able to:

- Gain clarity on the role of marketing in your organization
- Identify marketing leadership challenges and how to overcome them
- Describe their leadership identity as it relates to their bank and marketing team
- Understand the key dimensions of effective marketing leadership
- Determine how much time and effort bank marketers should spend on key dimensions of effective marketing leadership
- Determine how to improve marketing's credibility inside the bank

### Course Content:

- The role of marketing in your organization
- The marketing leadership challenges facing bank marketers
- Your leadership identity
- The key dimensions of effective marketing leadership
- How effective marketing leaders should spend their time and effort
- What it takes to be a strong leader
- Improving marketing's internal credibility

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**"Lance Kessler does an excellent job presenting the material and providing valuable and practical information."**

— Bank Marketing School Graduate

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## ABA Bank Marketing School

# Marketing Planning

**Instructor: Lance Kessler, CFMP**

Using the Path to Superior Execution as its framework, this course details how marketing planning does not happen in a vacuum. Learn how to implement a five-step participatory marketing planning process, and how the situation analysis, competitive strategy, market segmentation and more play a role. You'll practice applying those elements to a real-life case study in a group exercise that includes presenting your group's marketing plan to the class.

### Course Objectives:

After successfully completing this course, you will be able to:

- Identify the Path to Superior Execution and how marketing planning relates to that path
- Describe the role of marketing in financial institutions
- Understand The Integrated Marketing Pyramid as it relates to an organization's competitive strategy
- Explain how an organization's competitive strategy relates to the marketing planning process
- Describe the role market segmentation plays in developing customer-centric marketing plans
- Understand the components of an effective marketing plan and know how to build one
- Apply the concepts in this course to a real-life case study and at your bank

### Course Content:

- The Path to Superior Execution
- The role of marketing in financial institutions
- Situation analysis
- Competitive strategy and competitive advantage
- The Integrated Marketing Pyramid
- Focus on the customer and on revenue generation
- Customer-centric model
- The challenges of human engagement and digital engagement
- Market segmentation: framework and application
- Participatory marketing planning process
- Bank-wide marketing planning
- Local market-level marketing planning
- Measurement of marketing plans
- Leadership and accountability in the execution of a marketing plan

**"This was a beneficial course. It's good to get an overview of what drives change in the bank."**

— Bank Marketing School Graduate

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## ABA Bank Marketing School

# Marketing Profitability: Bank Financial Analysis and Asset/Liability Management

**Instructor: Peggy Hudson, CFMP**

Understanding the components of a balance sheet, and how they drive income statements, is critical to understanding how marketing affects bank performance. Management reporting, including Asset-Liability Management (ALCO) and profitability reporting, are used internally to manage risks, measure progress and drive decision-making. In this session, learn to identify profit drivers that result in positive financial performance and how to develop a strategy that focuses on strategic objectives that drive long-term success.

### Course Objectives:

After successfully completing this course, you will be able to:


- Understand the composition of bank balance sheets and income statements
- Calculate balance sheet and income statement ratios most commonly used by internal and external bank constituents
- Identify best-of-class performance
- Understand the impact of risk and profits on a bank's interest rate
- Recognize how risk, pricing and performance affect a bank's liquidity position
- Understand the drivers of line of business, product and customer profitability
- Identify how marketing activities relate to bank profitability and strategy

### Course Content:

- Bank financial statements
- Bank balance sheet and profitability ratios
- Traditional interest rate risk sensitivity gap analysis
- Net interest income and economic value of equity due to interest rate changes
- Bank liquidity calculation and understanding
- Definitions of organizational, product and customer profitability
- Components of profitability: funds transfer pricing, cost allocation, capital assignment
- Strategic planning process
- Using management information in strategy development and measurement

**"You can tell Peg really knows her stuff."**

— Bank Marketing School Graduate

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## ABA Bank Marketing School

# Marketing Return on Investment (ROI)

**Instructor: Joann Marsili, CFMP**

Marketing professionals are required to fill many roles within a financial services organization. They provide strategic direction, research client needs, conduct competitive intelligence, develop new products, manage company communications, support sales activities and more. Given the large demands and challenges of the job, many find it difficult to effectively evaluate and prioritize marketing activities. In this session, learn to show the financial ROI of your bank marketing endeavors.

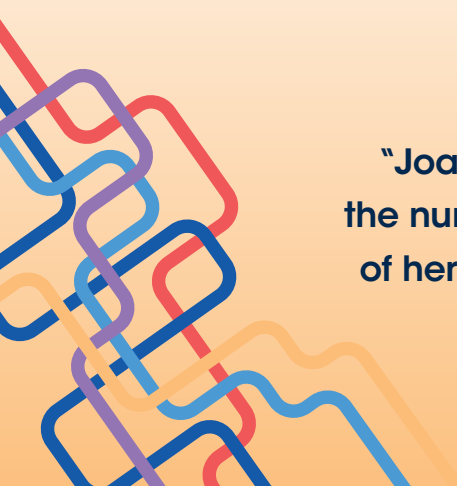
### Course Objectives:

After successfully completing this course, you will be able to:

- Calculate ROI for marketing campaigns
- Evaluate the economic value of marketing programs
- Demonstrate ROI's impact on budget

### Course Content

- The importance of ROI to you and to your institution
- Building the case for a marketing budget
- The economic value of marketing programs
- The creation of unique value propositions to help drive increased sales, lower the cost of acquisition, differentiate your bank and help you grow faster than the competition
- How to measure ROI

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**“Joann was an excellent presenter and helps make the numbers make sense. I will definitely be using some of her tactics when presenting to my executive team.”**

— Bank Marketing School Graduate

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## ABA Bank Marketing School

# Marketing Risk Management

**Instructor: Charles LeFevre, CRCM**

Reputation risk affects an institution's ability to establish new relationships, products or services, and continue serving existing relationships. This risk can expose an organization to litigation and financial loss, as well as damage the brand. Aside from reputational damage, operational risk can lead to increased costs or decreased revenue. In this course, learn to manage operational risk so you can ensure that your marketing programs are executed accurately, on time, on budget and on strategy.


### Course Objectives:

After successfully completing this course, you will be able to:

- Enhance and lead the marketing risk management discipline at your organization
- Use tools and techniques associated with documenting and assessing risk, managing risk events and storing important documentation
- Understand best practices for marketing compliance and audit preparedness

### Course Content:

- What is marketing risk, and how to identify and assess those risks
- When to accept, mitigate or transfer risk
- Explore efficient and effective controls that don't block creativity and impede customer experience
- Overview of processes that should be documented by every marketing department and how to do so

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**“Charles made what could have been a boring subject into something that engaged the audience and helped us learn by producing real-world comparisons to bank risk.”**

— Bank Marketing School Graduate

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## ABA Bank Marketing School

## PR/Communications

**Instructor: Theresa Wendhausen, CFMP**

In this course, examine mass and digital media from the perspective of both receivers and senders of marketing communications. Learn to consider both the consumer and business markets in a rapidly changing environment. Consider how your organization handles PR, including requests for donations, media list compilation, media contact strategies and the creation of an annual communications plan.


### Course Objectives:

After successfully completing this course, you will be able to:

- Identify and use available communication channels
- Develop a measurable communication and public relations plan
- Recognize the elements to consider when creating a strategic program for community giving
- Use media contacts and annual marketing calendars
- Manage corporate citizenship activities to increase visibility

### Course Content:

- Identification of communications channels that currently exist
- B2B and B2C use of channels
- Discussion on the strengths and weaknesses of different channels
- Benefits of optimizing channel use
- Definition of public relations management
- Strategic choices to consider when creating a corporate giving program
- Best practices for crisis communication

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**“Great course. Very helpful and the real examples were great.  
I will definitely use these insights to further my PR tactics.”**

— Bank Marketing School Graduate



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## ABA Bank Marketing School

# Sales and Marketing Alignment

**Instructor: Shelley Regin, CFMP**

When the sales and marketing teams work toward the same objectives, they can create a powerful growth engine for revenue generation. Strategic business goals, such as product-based marketing, have been catalysts for sales and marketing alignment — encouraging marketing and sales teams to work together to identify product offers, target markets and create results-focused campaigns using available data and ROI measurement. This course will help you align sales divisions and marketing teams to develop successful marketing campaigns and strategies to achieve bank-wide goals and objectives.


### Course Objectives:

After successfully completing this course, you will be able to:

- Help sales teams translate big picture strategies into tangible opportunities
- Create effective and profitable strategies to drive revenue growth
- Create a framework in which sales and marketing teams can effectively work together to achieve optimal results
- Understand how ROI affects campaign management

### Course Content:

- Coordinating sales and marketing practices across an organization
- Exercises to engage in learning by application
- Group discussion on topics related to working with sales teams
- Actionable takeaways to implement at your bank

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**“This course gave a lot of practical takeaways and examples. Shelley was a great and knowledgeable instructor.”**

— Bank Marketing School Graduate

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## ABA Bank Marketing School

# Social Media Marketing

### Instructor: Amber Farley

In this course, we will discuss the strategy, uses and planning required to succeed in the fast-changing world of social media marketing. Social networks are constantly stepping up their game to keep users engaged and entertained. Your organization's social strategy should be doing the same. Whether you're focused on becoming a trusted resource, humanizing the bank, highlighting community involvement, promoting bank products, developing business opportunities or extending your customer service offerings, this course will show you how to achieve results in the social space.

### Course Objectives:

After successfully completing this course, you will be able to:

- Develop a social media strategy that aligns with the strategic objectives of your bank
- Optimize your bank's presence across multiple platforms
- Create social media content that drives engagement
- Streamline social media management
- Plan, place and measure social ads

### Course Content:

- Organic social strategy checklist
- Content that engages an audience
- Content and short-form video best practices
- Social selling
- Social media tools and dashboards
- Performance metrics
- Social evolution and learning what's ahead

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**"So much useful information and such an energetic instructor!"**

— Bank Marketing School Graduate



## ABA Bank Marketing School

### Meet the Faculty

#### **Amber Farley**

Partner & EVP  
Brand Development  
**Financial Marketing Solutions**  
Franklin, TN

#### **David Femi**

Senior Vice President,  
Business & Professional Banking  
Regional Manager  
**M&T Bank**  
Bridgeport, CT

#### **John Hanley, CFMP**

Chief Marketing Officer  
**Equity Bank**  
Overland Park, KS

#### **Peggy Hudson, CFMP**

Bank Marketing Consultant  
Dubuque, IA

#### **Kimberley Kaschke, CFMP**

Managing Director, Enterprise Marketing  
Strategy & Planning  
**First National Bank of Omaha**  
Omaha, NE

#### **Lance Kessler, CFMP**

President, Lance Kessler & Associates -  
Marketing Consulting and Training  
Mechanicsburg, PA

#### **Charles LeFevre, CFMP**

EVP, Chief Operations Officer  
**Sovereign Bank**  
Oklahoma City, OK

#### **Shelly Loftin, CFMP**

Senior Director  
Marketing Strategy & Sales Enablement  
**Arvest Bank**  
Benton, AR

#### **Joann Marsili, CFMP**

EVP, Chief Growth &  
Client Experience Officer  
**Fidelity Bank**  
Leominster, MA

#### **Shelley Regin, CFMP**

SVP, Marketing  
**Country Bank**  
Ware, MA

#### **Theresa Wendhausen, CFMP**

Vice President, Branding and  
Communications Manager  
**First National Bank and Trust Company**  
Beloit, WI

#### **Hunter Young**

Founder & President  
**HIFI Agency**  
Raleigh, NC





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Bankers  
Association®