



2026 Course Catalog

**ABA
Bank Marketing
School**

April 18–24, 2026

Emory Conference Center Hotel
Atlanta, GA





Reshape your bank's growth potential

with ABA Bank Marketing School.

In one dynamic and immersive week, you'll learn to think more strategically about your marketing and how to align your campaigns with your bank's ROI, profitability and customer experience goals. Our faculty of leading bank marketers will teach you the latest strategies, tactics and tech tools that will help level up your marketing.

With this interactive school, you'll also build a lifelong career network and kick-start your journey to earning ABA's Certified Financial Marketing Professional (CFMP) certification, which demonstrates your marketing expertise to employers, regulators and customers.

Register today.
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**ABA
Bank Marketing
School**

ABA Bank Marketing School Core Competencies



Demonstrate
Your
VALUE



Develop
Your
STRATEGY



Know
Your
MARKET



Understand
Your
AUDIENCE



Calculate
Your
ROI

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Orientation and Pre-Recorded Courses

ORIENTATION

MONDAY
April 6

1:00 PM – 2:00 PM
Student orientation

PRE-RECORDED COURSES

1 Hour
Sales & marketing alignment I

1 Hour
Marketing ROI I



ABA Bank Marketing School

Daily Schedule

All times are in ET.

SATURDAY April 18 <p>5:00 PM – 6:00 PM Welcome and orientation</p>	SUNDAY April 19 <p>8:00 AM – 10:00 AM Marketing planning I</p> <p>10:15 AM – 2:30 PM Marketing ROI II</p> <p>2:45 PM – 4:00 PM Data & analytics</p>	MONDAY April 20 <p>8:00 AM – 10:00 AM Marketing planning II</p> <p>10:15 AM – 1:45 PM Sales and marketing alignment</p> <p>2:00 PM – 4:15 PM Brand intelligence</p>	TUESDAY April 21 <p>8:00 AM – 9:30 AM Marketing planning III</p> <p>9:45 AM – 11:45 AM Expanding reach in consumer banking</p> <p>12:45 PM – 1:45 PM PR/communications I</p> <p>2:00 PM – 4:30 PM PR/communications II</p> <p>4:45 PM – 5:30 PM CFMP exam prep</p>
WEDNESDAY April 22 <p>8:00 AM – 10:15 AM How banks make money</p> <p>10:30 AM – 12:00 PM Marketing risk management</p> <p>1:00 PM – 3:00 PM Content marketing and management</p> <p>3:15 PM – 5:30 PM AI in marketing</p>	THURSDAY April 23 <p>9:00 AM – 10:30 AM Compliance and marketing I</p> <p>10:45 AM – 12:15 PM Compliance and marketing II</p> <p>1:00 PM – 5:00 PM Student group exercise</p>	FRIDAY April 24 <p>8:00 AM – 10:15 AM Student group presentations</p> <p>10:30 AM – 12:30 PM Effective marketing leadership</p>	



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

Authentic intelligence: Using AI to power your brand

Instructor: John Hanley, CFMP

Marketing teams face shrinking resources, increasing channels and customers' shortening attention spans — along with a demand to use AI tools to get leaner, smarter, faster and more proficient. But what's real? And when and how should you embrace the gains promised by AI to deliver outstanding performance, resonance and return on investment for your financial brand? We'll explore use cases, tools, tricks and tactics to employ AI, and help you capture the promise of AI while avoiding pitfalls for your brand.

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 team and your bank
- Identify various use cases within financial marketing
- Demonstrate understanding of AI interaction and basic GenAI usage in banking

Course content:

- The demystification of AI/GenAI
- What's beyond ChatGPT, Gemini and Anthropic
- Benefits and use cases in banking and financial marketing
- Shifting consumer perceptions and why that matters
- Ethical considerations for the future of AI/GenAI
- Basics of AI to assist content creation, creative development and marketing strategy
- Hands-on practice with GenAI



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Brand intelligence

Instructor: Amber Farley

Your bank has a brand. The long-term value of the bank will depend on the value of that brand. Your ultimate goal should be to establish a unique brand and advance that brand through every internal and external effort of the entire organization. Doing so will strengthen the undercurrent of all other marketing actions and deliverables. This course will focus on building your passion to manage the brand and elevate your bank's culture and market share.

Course objectives:

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

- Summarize why brand is important for the bank's long-term success
- Understand how marketing and branding work together
- Audit the bank's existing brand and develop a plan for improvement
- Identify steps involved in the process of developing and building a meaningful and authentic brand for the bank
- Unite and ignite bank employees around a central belief system
- Understand how to advance the brand of the bank across both internal and external channels
- Manage and measure the effectiveness of branding efforts

Course content:

- Discussion on what brand is (and isn't) and why it matters
- Tools to evaluate and audit the existing brand of the bank
- Proven process to discover, define, deliver and develop the bank's brand
- Techniques for internal branding and culture cultivation
- Guidelines for implementing brand standards
- Tactics for integrating brand messaging with product/service promotion
- Metrics and strategies for measuring success



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 an overview of the laws and regulations that govern a bank's advertising and market planning so you can best mitigate compliance risk. You will learn how these laws and regulations relate to loan, deposit and non-traditional products, as well as gain practical knowledge to ensure your bank's advertising is effective and compliant when developing 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 products 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



Content marketing and management

Instructor: Emily Schwartz, CFMP

Learn 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 grows individual business lines of focus. You'll also learn a proven process to generate endless story ideas and discover ways to research, remix and repackaging your content so it engages your customers and meets your goals.

Course objectives:

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

- Understand and apply best practices surrounding the focus and format of content
- Develop a content marketing strategy that aligns with business goals
- Create engaging and valuable content that resonates with specific target audiences
- Continuously improve content marketing efforts to drive results and grow business
- Evaluate content to repurpose across various channels

Course content:

- Idea generation tools and frameworks
- Mapping content to business goals
- content storytelling best practices
- content management optimization strategies



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Data and analytics

Instructor: Hunter Young

The rise of advanced data analytics and scalable data has transformed how financial institutions approach marketing. In this course, you'll explore diverse data types used to drive both traditional and digital marketing strategies. You'll learn how to extract, analyze and operationalize data to uncover actionable insights, optimize marketing efforts and stay competitive in a rapidly evolving digital landscape.

Course objectives:

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

- Strategically map and leverage the data available within your institution and vendor systems
- Extract, organize and analyze data to support business growth and informed decision-making
- Forecast customer behavior and optimize marketing spend using predictive analytics
- Assess digital marketing performance using real-time data and advanced metrics

Course content:

- Identifying and utilizing customer, market and digital data sources
- Measuring campaign performance using key marketing metrics (CPC, CPM, CPA, LTV)
- Approaches to demographic, psychographic and behavioral segmentation
- Data visualization techniques to effectively communicate insights
- Tools and technologies for data analysis and funnel reporting



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 what the role of marketing should be in your organization
- Identify marketing leadership challenges and how to overcome them
- Describe your leadership identity as it relates to your 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



Expanding reach in consumer banking

Instructor: David Femi

Consumers from various backgrounds play an integral role in expenditure growth in the country. Understanding the unique needs and preferences of differing consumer segments is essential for banks and brands looking to build lasting relationships. In this course, learn how tailored marketing approaches can drive meaningful engagement and business success.

Course objectives:

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

- Understand the value of creating brands that resonate across communities
- Identify best practices for developing and executing marketing strategies that connect with various communities
- Establish a presence with different market segments within your footprint

Course content:

- The shifting makeup of communities across the country
- Expanding the business case internally for reaching new markets
- Brand positioning and execution
- Embracing the new majority
- Expanding marketplace growth strategy and story



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How banks make money

Instructor: Ben Crowley

This course equips bank marketing professionals with a clear, actionable understanding of how banks generate revenue, drive profitability and measure performance — so they can align marketing strategy with financial outcomes. You will learn how deposits, lending, fee income and balance sheet management work together to fuel growth, and how concepts like net interest margin, funds transfer pricing, product profitability and customer profitability shape the bank's bottom line. The course translates financial and operational drivers into insights marketers can use to target high-value segments, design profitable products, improve deposit mix, support strategic initiatives and communicate value across the organization. By the end, you will understand how your marketing decisions influence — and are influenced by — the bank's financial engine, enabling more strategic, data-driven and performance-oriented marketing.

Course objectives:

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

- Equip bank marketers with a clear understanding of how banks generate revenue and profit
- Translate financial and operational concepts into marketing relevant insights
- Strengthen marketers' ability to target profitable customer segments and influence deposit and loan mix
- Help participants align marketing strategy with measurable financial performance goals
- Enable marketers to contribute more effectively to strategic planning, pricing and growth initiatives

Course content:

- Overview of the bank business model and primary revenue drivers
- Breakdown of key profitability metrics, including spread, NIM, cost of funds and product profitability
- Insights into deposit behavior, loan performance and factors that drive overall bank profitability
- Introduction to funds transfer pricing and its relevance for product and segment strategy.
- Fee income sources and opportunities for marketing to support non-interest revenue growth
- Performance measurement at the bank, product, branch and customer levels
- Applications for marketers: targeting strategies, portfolio mix optimization, messaging, and value communication



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 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 entire 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
- 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 transfer them to the workplace

Course content:

- The Path to Superior Execution
- The role of marketing in financial institutions
- Situation analysis
- Competitive strategy and competitive advantage
- 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



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
- Create unique value propositions to help drive increased sales, lower the cost of acquisition, differentiate your bank and help you grow faster than the competition

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
- How to measure ROI



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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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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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Sales and marketing alignment

Instructor: Shelley Regin, CFMP

When sales and marketing teams unite around shared goals, they become a formidable engine for driving revenue growth. This course, tailored to professionals in sales and marketing roles, will equip you with the tools and strategies to effectively align sales and marketing efforts, enhancing your ability to create impactful, data-driven campaigns that resonate with the C-suite.

Course objectives:

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

- Empower sales teams to transform overarching strategies into actionable opportunities.
- Develop effective, revenue-generating strategies that align with organizational goals
- Establish a collaborative framework that maximizes the synergy between sales and marketing teams for optimal outcomes
- Analyze how ROI influences campaign management and decision-making
- Utilize sales and marketing metric-driven reporting

Course content:

- Integrating sales and marketing practices across the organization
- Hands-on exercises for practical application
- Group discussions focused on collaborating with sales teams
- Actionable insights to implement within your bank
- Leveraging LinkedIn for Sales teams



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Faculty

Ben Crowley

Managing Director
Wolf & Company
Philadelphia, PA

Amber Farley

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

EVP, Chief Experience Officer
Idaho First Bank
Overland Park, KS

Lance Kessler, CFMP

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

Charles LeFevre, CRCM

Director of Compliance Operations
Kadince
New Orleans, LA

Joann Marsili, CFMP

Marketing Consultant
Leominster, MA

Shelley Regin, CFMP

Chief Marketing and
Community Relations Officer
Country Bank
Ware, MA

Emily Schwartz, CFMP

Director of Financial Education
MidFirst Bank
Tempe, AZ

Theresa Wendhausen, CFMP

Marketing Consultant
Beloit, WI

Hunter Young

Founder & President
HIFI Agency
Raleigh, NC



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Notes

A decorative graphic in the bottom left corner consisting of a stylized, multi-colored geometric pattern. It features a central yellow and orange diamond shape, surrounded by pink, red, and blue shapes, all set against a dark blue background.



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