



# 2020 LBA Retail Conference (Virtual)

## September 18, 2020

### 9:00am - 12:15pm

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### Conference Agenda

9:00 a.m. – 9:55 a.m.

#### **Design Thinking for a Delightful Banking Experience**

*Mark Haldeman, Product Manager, nCino*

Fintech startups, alternative lenders, and evolving customer expectations are forcing financial institutions to change the way they develop new products and services. Instead of focusing solely on internal processes and operational efficiencies, banks must also employ “design thinking.” This strategy uses proven business management strategies to foster creativity and innovation, develop products that meet the users’ needs, and create an experience that delights both the customer and the employee, all of which are vital to a financial institution’s ability to survive and thrive in a changing landscape.

9:55 a.m.– 10:10 a.m.

#### **Break**

10:10 a.m. – 11:05 a.m.

#### **Stop Selling and Start Connecting**

*Patrick Dix, VP-Public Relations, SHAZAM*

It’s not enough to be your community’s “hometown bank.” It’s more than telling a potential customer it’s “your people” who make the difference. They really don’t care how many years you’ve been in business. It’s time to focus on your story. Explore the ways digital media is changing the way we market to consumers, new ways customers are digesting information, and how you can differentiate your message by connecting with customers through storytelling instead of trying to sell to them.

11:05 a.m. – 11:20 a.m.

#### **Break**

11:20 a.m. – 12:15 p.m.

#### **Beyond Brand Awareness: Strategies to Drive Digital Account Opening**

*Danielle Baxter, nCino*

As banks increasingly branch out to online products, financial marketers are faced with new challenges and required to adopt a new mindset - make digital experiences feel personal; create a seamless brand across multiple channels; and, acquire accounts without human interaction. This session will share how savvy financial marketers are using technology solutions and data-driven, personalized campaigns to create meaningful and engaging experiences that ultimately drive accounts in these new channels.

12:15p.m.

#### **Adjourn**

### Who Should Attend

Retail Managers, Retail Staff, Operations Officers, COOs, CFOs, Sr. Management, Marketing, Technology Officers and Lending



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## Conference Speakers

**Mark Haldeman** is a Product Manager at nCino and is responsible for building the vision and roadmap for nCino's Deposit Account Opening solution. From identifying strategic opportunities in the market to building products across multiple development teams, Mark helps to ensure that nCino is constantly on the pulse of innovation through every step of the customer journey. Prior to nCino he was a Salesforce Administrator, Marketing Coordinator, and B2B Sales Representative.

**Patrick Dix** is a former news anchor who brings his story-telling approach to audiences on a variety of topics. From working with the media, to crisis communications, to the latest issues in the payments industry, Patrick provides commentary to help audiences understand complex topics and delivers easily digestible takeaways they can use at their institution. Patrick leads SHAZAM's strategic partnerships with more than 70 industry organizations and trade associations, supporting their advocacy efforts and ensuring community financial institutions have a strong voice in the payments industry.

**Danielle Baxter** is a Senior Product Marketing Analyst for nCino, a privately held fintech company headquartered in Wilmington, N.C. Danielle is a researcher at heart who is responsible for developing global narratives and strategic marketing content to support nCino's Retail Banking, Small Business and Customer Engagement solutions. She joined nCino in 2019 with nearly a decade of experience in software marketing across various industries, including: oil and gas, pharmaceutical research and telecommunications. Danielle enjoys pampering her dogs and racing yachts competitively. She is a graduate of Virginia Tech and Indiana University, where she earned degrees in Public Policy, Communications and Media Studies in addition to attending the Maurer School of Law.

## Registration Information

### Registrant 1

Mr./Mrs./Ms. \_\_\_\_\_  
Bank \_\_\_\_\_  
Email Address \_\_\_\_\_  
Branch Street Address \_\_\_\_\_  
City, State, Zip \_\_\_\_\_  
Phone \_\_\_\_\_  
Cell \_\_\_\_\_

- I will attend the live virtual conference
- Please send me the recording of the conference

### Registrant 2

Mr./Mrs./Ms. \_\_\_\_\_  
Bank \_\_\_\_\_  
Email Address \_\_\_\_\_  
Branch Street Address \_\_\_\_\_  
City, State, Zip \_\_\_\_\_  
Phone \_\_\_\_\_  
Cell \_\_\_\_\_

- I will attend the live virtual conference
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## Payment Options

Check (Made payable to the Louisiana Bankers Association)  
 Visa       MasterCard       American Express  
Card # \_\_\_\_\_ Expiration Date \_\_\_\_\_  
Amount to be charged on card \$ \_\_\_\_\_  
Name on Card (Please Print) \_\_\_\_\_  
Billing Address \_\_\_\_\_  
Signature \_\_\_\_\_

<b>Registration Fee for Live Conference</b> \$265, per LBA member \$465, per non-member <b>Registration Fee for Recording</b> \$178, per LBA member \$310, per non-member <small>*recording will only include two of the three sessions*</small>
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\$265, per LBA member  
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### Registration Fee for Recording

\$178, per LBA member  
\$310, per non-member  
\*recording will only include Design Thinking for a Delightful Banking Experience & Beyond Brand Awareness: Strategies to Drive Digital Account Opening sessions\*

## Agenda

9:00 am Program Begins  
12:15 pm Program Ends

## Conference Materials and Instructions

Information to join the conference and materials will be sent by email in advance of the conference.

Submit registration and view roster in the Education Section of LBA's Website, [www.lba.org](http://www.lba.org)