programs for your next conference, educational workshop or webinar from market insights, inc.
The threat of disruption has become the new normal within financial services. We know that your members are looking for ways to adjust and adapt to the rapid pace of change; and they look to you for the information and tools they need to succeed – often through the educational programming you provide. As you develop your calendar for 2020, we are pleased to present these topics and our presenters for your consideration.

A great presentation can change how an audience thinks, feels, and most importantly, acts. Our experts have put together a series of programs that will answer your members’ most pressing questions and concerns and prompt action. While these topics have been carefully crafted to provide practical, forward-thinking ideas, they are always customized to meet your desired format, your market, your convention theme and your audience. Moreover, our fees are flexible and generally based on your unique needs.

Call me today to book a presentation for your next meeting or conference:

**contact info**

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Joe Sullivan, CEO
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“A digital touch here and there is not the way to go. Banks need to overhaul the way they behave.”

- Arun Biswas
IBM Global Business Services

Digital disruption of financial services has been debated in articles, podcasts and research studies for years. Yet many community banks and credit unions are just waking up to the realities of the digital age.

In fact, for many senior management teams and boards, the wake-up call has been followed by sheer panic. Executives are now discovering they have arrived at a moment of truth – and they need to act quickly.

This thought-provoking and forward-looking presentation will examine trends dealing with 1) consumer behavior, 2) technology, 3) retail delivery, and 4) the workforce.

Participants will discover how these trends may be understood in the context of their local markets and used to make the strategic choices about what must change, what to prioritize and what resources — both capital and human — will be required for future success. The presentation will also outline three steps bankers can take to meet the challenge of disruption head-on.
Also new for 2020

Changing Culture for Digital Transformation

In banking, one of the biggest roadblocks to successful digital transformation is culture. The best strategies and newest technologies will fail if they conflict with how individuals or groups already believe or behave. Culture change requires intense effort and is often the most challenging part of digital transformation; but successful companies are meeting the challenge by enhancing cultural characteristics that support success in digital space.

This session will share a framework for creating and cultivating a culture that both understands and advances digital transformation. With examples from throughout the financial services industry, participants will learn:

- 5 ways to assess and evaluate your current culture
- steps to remove cultural aspects that inhibit digital transformation
- 4 digital culture characteristics, and practical ways to build and sustain them
- The role of effective internal communication in creating one unified culture

Repurposing the Branch

Most bankers recognize that the purpose of branches is changing. Branch networks must evolve to incorporate new technologies and align with new consumer behaviors for the institution to remain relevant and profitable. But there is no “one-size-fits-all” branch transformation strategy and solutions are no longer limited to consolidate or close. In fact, some institutions are finding innovative ways to use their real estate.

How do community banks and credit unions decide what changes to make to their branches in order to achieve the greatest result? What alternatives to the traditional branch are creating an experience that matters to customers? This session will provide a framework for making the tough decisions about branch transformation and explore the variables that should shape a community bank or credit union’s branch transformation strategy, including:

- The shifting consumer relationship with the role of the branch and branch employee
- The relevant data points that are key to making decisions about the branch network
- The alternative uses for brick-and-mortar that are building brands and creating buzz

Three Ways to Future-Guard Your Marketing Strategy

One new trend or technology can put your marketing, and your financial institution, on a path toward obsolescence. Only the creative, agile marketer will be able to help their institution stay competitive. This session explores emerging consumer behaviors and marketing trends and sets out three ways to keep your marketing less susceptible to emerging threats in the future.
Market Insights – 2020 Presentation Topics

This session is designed to inspire innovative thinking and help bank marketers navigate an increasingly digital landscape. Participants will look at tangible ways to move beyond the basics and breathe new life and success into their marketing efforts.

Standing for Equality: Connecting with LGBTQ Consumers

Financial institutions are increasingly evaluated for their perceived or actual stance on social issues. Last year’s 50th anniversary of the 1969 Stonewall Riots saw many larger banks and credit unions delivering messages of inclusion and LGBTQ equality. This session explores why and how smaller institutions should finally take a stand for equality.

As consumers become more accepting of the LGBTQ community, companies realize that showing support for equality makes good business sense. While there is widespread acceptance of LGBTQ individuals, there is still lingering prejudice. What are the lessons in this current climate for marketers? It is time to look at the internal roadblocks and external pathways to successful LGBTQ outreach.

Community-based financial institutions can demonstrate their authentic commitment to LGBTQ equality. This session will outline what bank and credit union marketers need to know, and what to avoid, when marketing to LGBTQ audiences and their allies.

other available topics

The Emerging Consumer and How to Bank Them
Future of Banking
Tackling the Talent Crisis
From Data to Decision Making
Guerrilla Marketing Creating Buzz on a Budget
Become a Banking Entrepreneur
Making the Most of a One-Person Marketing Department

perfect for your next board or staff retreat

Purpose, Passion and Profits
A new path to a profitable future

Joe Sullivan will take the audience on an inspiring journey through the principles that will drive success for companies in the new connection economy. Tactical steps will be shared to help organizations identify their central purpose and ignite passion on their teams.
Strategies to Keep Banking Human

Concern is being expressed in board rooms and branches about the ultimate impact of the digital transformation of banking. As every technological innovation comes online, human interaction is reduced or replaced; and financial institutions must find new ways to maintain trust, build loyalty and deepen relationships.

This presentation will present 4 key insights into both personal and institutional behaviors that strike a balance between automation and human connection and share practical ways to a) improve customer engagement through the right use of data; b) adjust branding to humanize the digital customer experience; c) modify internal and external communications; and d) utilize 3 leadership skills necessary to help an institution harness technology, while preserving human connection.

“Suppressing digital transformation is NOT the answer. Finding new ways to keep banking human, IS!”

- Joe Sullivan
Joe Sullivan has spoken at our CEO, Marketing, HR/Education Conferences (to name a few) – always with good results. I find Joe’s enthusiasm and knowledge refreshing and stimulating and I always learn something new.

Liz Wilson, CAE, Executive Vice President
Washington Bankers Association

I know when I’ve engaged Joe Sullivan as a conference speaker, my audience is in for a great experience. Over the years, Joe has consistently delivered well-researched, thought-provoking and contemporary topics for a variety of banking audiences.

Kathy Box, Executive Vice President
Texas Bankers Association

Jim Perry’s presentation was once again very well received and earned highest marks from our attendees. Truly, the information was right on target.

Susan Poling, Communications Manager
Ohio Bankers League

Joe is an engaging speaker who has the innate ability to connect with his audience through effective storytelling and a tone that feels conversational. He demonstrates remarkable control of the subject matter being explored, creating an immediate trust with those fortunate enough to hear him speak. From practical takeaways to a shift in conceptual thinking, Joe delivers!

Gina Stratos
Professional Development Manager & Editor
Western Bankers Association

Joe Sullivan is the CEO and Founder of Market Insights. As a consultant, author and speaker with more than 25 years of experience in the industry, the themes of relevancy and growth can be found throughout Joe’s work. Over the years, Joe has been invited to share his insights with many international, national, regional and state associations and banking schools — on topics ranging from marketing and delivery network planning, to brand positioning and leadership.

Joe’s forward thinking approach and energetic style engages his audiences and consistently makes him a top-rated speaker. He routinely challenges conventional thinking and creates a sense of excited urgency with his audiences.

Jim Perry is Senior Strategist at Market Insights. Jim has consulted with clients throughout the United States. Much of his work is concentrated on marketing, branding, leadership development and strategic planning. Thousands of banks, credit unions and industry leaders follow his daily Twitter feed for emerging trends and the latest on mergers, marketing, fintech and much more.

As a consultant, trainer and public speaker, Jim is known for making complex concepts easy to understand and simple to apply.