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## How to Attract and Retain Your Most Important Customer Segments in 2019

October 3, 2018

- 9:00- 9:30 a.m.      **Registration and networking over coffee**
- 9:30-9:45 a.m.      **Welcome**
- 9:45-10:15 a.m.      **The Five Segments to Watch and What's Driving Them Right Now**  
*Helen Lawler, President, FINspiration*  
Learn how the five key segments behave in the current environment.  
Explore why one-size approach does not work and how to leverage your strengths.
- 10:15-10:30 a.m.      **Break**
- 10:30-11:00 a.m.      **Why Consumers Switch Banks and What they are Looking For: What the latest customer data says.**  
*Bruce Paul, CEO, Customer Experience Solutions*  
2018-2019 banking trends, from the customer point of view. Learn what they think of their own institution and what they think of prospective institutions.
- 11:00-11:30 a.m.      **Key Note: What does your welcome mat say? The importance of the onboarding process for developing customer engagement and loyalty.**  
*Tricia Hrotko, Regional Sales Executive, Digital Onboarding*  
Learn how to best engage and retain customers early in the lifecycle/ journey
- 11:30-12:45 p.m.      Lunch and networking
- 12:45-1:15 p.m.      **How Your Brand's Visual Marketing and Advertising Affect Customer Engagement Across the Key Segments**  
*Jenna Smith, CEO, Smith Design*  
How does the consumer journey change with visual reinforcement of brand?  
What is the importance in picking the right visual message?
- 1:15-1:45 p.m.      **How to Deploy Best-in-Class Public Relations Strategies that Effectively Target, Attract and Retain Key Customer Segments**  
*Kathleen McMorow, Principal, The Communications Optic*  
How to strategize and deploy best-in-class public relations initiatives that effectively target, attract and retain all key customer segments
- 1:45 -2:00 p.m.      **Closing remarks**

## Keynote Speaker



### **Tricia Hrotko, Regional Sales Executive, Digital Onboarding**

Tricia is a senior marketing and sales professional, with over 18 years of experience in the banking industry. She most recently served as EVP and Chief Revenue Officer at Clifton Savings. Prior experience includes leadership roles at Sterling National Bank (NYC) and The Provident Bank (NJ). Tricia joined Digital Onboarding in April 2018 and loves getting the opportunity to meet with bank and credit union professionals across the U.S.



### **Helen Lawler, President, FINspiration**

Helen is a diverse marketing and product management executive with more than 20 years of financial services experience. She has held management and leadership roles including high-profile positions at Fortune 100 companies such as ADP, HSBC, and most recently, at Fiserv. Her knowledge of strategic plans, SaaS analytics and tactical execution has repeatedly won her recognition for profitable programs. She earned both her M.A. and B.S. degrees from Seton Hall University with studies in Marketing and Communication. She also holds a certificate in Pragmatic Marketing.



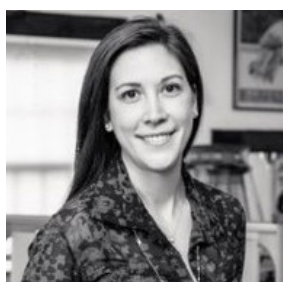
### **Kathleen McMorrow, Principal, The Communications Optic**

Kathleen is a seasoned business executive with 20 years of experience in integrated marketing communications and market research. Kathleen began her PR career at Nelson Healthcare Communications and later joined LVM Group. In 1998, she was recruited by Rubenstein Associates to serve as Senior Vice President of the real estate and law firm practice groups. She relocated to Los Angeles in 2015 where she formed a strategic communications consulting practice. Kathleen recently returned to NJ and founded The Communications Optic, which provides comprehensive Public Relations and Integrated Marketing Services. She is an honors graduate of The College of New Jersey and has completed graduate studies at Rutgers University.



### **Bruce Paul, President and CEO, Customer Experience Solutions**

Bruce leads Customer Experience Solutions, the producers of the New Jersey and New York Banking Benchmarks. He formerly was the Global Head of the Financial Services practice at the Nielsen Company and held senior positions at Greenwich Associates, Qualtrics, IPSOS and other research and consulting firms. An expert in Banking Customer Experience, he has worked with scores of banks and credit unions and personally designed the Customer Experience and/or Market Research programs at 7 of the top 15 North American banks, among many others. Bruce has degrees in Political Economy, Asian Studies, and Chinese from the Yale University Center at the Chinese University of Hong Kong and from the University of California at Berkeley. He is a former Fulbright Scholar.



### **Jenna Smith, CEO/President, Smith Design**

Jenna is CEO/President of Smith Design; a New Jersey based Brand Design Agency specializing in creating breakthrough visual solutions for established and emerging brands. Jenna plays key roles in business development, account management, design strategy, and creative direction. Prior to Smith Design, Jenna held marketing roles in Silicon Valley for Cisco Systems & McAfee Security. Jenna holds an MBA in Marketing & Finance, a MS in Packaging, and a BA in Marketing.