

6th Annual

# Digital Marketing *for* Financial Services Summit **MIDWEST**

October 9-10, 2024  
voco Chicago Downtown

**DRIVING CUSTOMER  
GROWTH THROUGH  
IMPACTFUL DIGITAL  
MARKETING &  
EXPERIENCE  
STRATEGIES**



Digital Marketing for Financial Services Summit



#DMFSMidWest

# New Features in 2024

**Finance sectors  
break-out  
discussions**



**Facilitated 45  
minute roundtable  
discussions**

**C-level Leaders  
Circle (invite only)**



**Live polling  
sessions**

**New workshops**



# 2024 Speaker Faculty

... AND MANY MORE!



**JUDY EDELSON**  
Chief Marketing Officer  
Apple Bank



**ALEJANDRA DENDA**  
Chief Marketing Officer  
The Federal Savings Bank



**DANIELLE BATEMAN GIRONDO**  
Chief Marketing Officer  
Midwest BankCentre



**LISA ZAKRZEWSKI**  
Chief Marketing Officer  
Leverage Retirement



**DONNA DOLEMAN DICKERSON**  
Chief Marketing Officer  
University of Michigan Credit Union



**SUMEET GROVER**  
Chief Digital & Marketing Officer  
Alliant Credit Union



**ADAM FISCHER**  
Chief Product & Innovation Officer  
Clearcover



**SHERYL MARKOV**  
Executive Vice President  
Head of Digital Design & Delivery  
Northern Trust Corporation



**NINA EDWARDS**  
Vice President  
Emerging Technology & Innovation  
Prudential Financial



**BEN UDELL**  
Senior Vice President  
Digital Innovation  
Lake Ridge Bank



**MARCO CARRUCCIU**  
Vice President  
Marketing  
TradeStation



**MATT LATTMAN**  
Senior Vice President  
Card Acquisition Marketing  
Discover Financial Services



# 2024 Speaker Faculty

... AND MANY MORE!



**LEONARD GREEN**  
Vice President  
Customer Success  
**Northwestern Mutual**



**JOHN HUNTINGHOUSE**  
Vice President  
Marketing  
**TAB Bank**



**KATE PURDY**  
Vice President  
Marketing & PR  
**Signal Financial**  
Federal Credit Union



**JASON LINDSAY**  
Marketing Director  
**Brookstone Capital Management**



**MARK REESE**  
Marketing Director  
**Tri-Merit**



**ANISH SHARAN**  
Head of Digital  
Transformation  
**Pritzker Private Capital**



**VLAD MOLDAVSKIY**  
Head of Marketing &  
Growth  
**Halo Investing**



**LEANITA RAGLAND-BROOKS**  
Former Managing Director  
& Vice President  
Strategic Relationship  
Management  
**Prudential Financial**



# DMFS Advisory Board



**DONNA DOLEMAN  
DICKERSON**  
Chief Marketing Officer  
University of Michigan  
Credit Union



**ANDY O'ROURKE**  
Chief Marketing Officer  
Direxion



**DONNA JERMER**  
Executive Vice President  
Chief Marketing Officer  
Insuritas



**JOHN RENZ**  
Vice President  
Head of Creative  
US Businesses  
Prudential Financial



**MITCH ROSE**  
Executive Director  
Digital Strategy - Content  
J.P. Morgan



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Marketing - Social Media  
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Marketing  
HomeEquity Bank



**SCOTT SPIDELL**  
Vice President  
Strategic Marketing  
First Command Financial  
Services



**MARCO CARRUCCIU**  
Vice President  
Marketing  
TradeStation



**DAN MOSHKOVICH**  
Vice President  
Marketing  
Chargeflow



**LEANITA  
RAGLAND-BROOKS**  
Former Managing Director  
& Vice President  
Strategic Relationship Management  
Prudential Financial



**GABY HENRIQUEZ**  
Director of Marketing  
Milo



WELLS FARGO

helcim

...MassMutual

MetLife

Nasdaq

S&P Global

ASCENSUS

Nationwide

AMERICAN EXPRESS

charles SCHWAB

CHASE

CIBC

Edward Jones

FARM BUREAU FINANCIAL SERVICES

# Who Attends?

Fidelity

Humana

AMERICAN FAMILY INSURANCE

INNOVATOR exchange-traded funds

JPMORGAN CHASE & CO.

Landmark CREDIT UNION Banking Made Easy

Northwestern Mutual

MarshMcLennan

mastercard

PRIMERICA

NORTHERN TRUST

Prudential

citi

STEWART PARTNERS

svb Silicon Valley Bank A Division of First Citizens Bank

canada life



# Industry sectors:

- » Banks
- » Credit Unions
- » Insurance Companies
- » Wealth Management Firms
- » Investment Managements
- » Asset Management Firms
- » Lending Companies

# Functions:

- » Marketing
- » Digital
- » Communications
- » Media
- » Performance
- » Social Media
- » Brand
- » Growth
- » Acquisition
- » CRM
- » Customer Journey
- » Customer Insight/Analytics/Data

- » Savings (inc. Pension plans) Companies
- » Payments
- » Cards
- » Neo Banks
- » Challenger Banks
- » BNPL and more..

- » Creative
- » Content
- » Strategy
- » SEM
- » SEO
- » Customer/Consumer Engagement
- » Customer/Consumer Experience
- » Demand Generation
- » Digital Product
- » Innovation
- » Membership
- » Personalization



# TOP 3 REASONS TO ATTEND



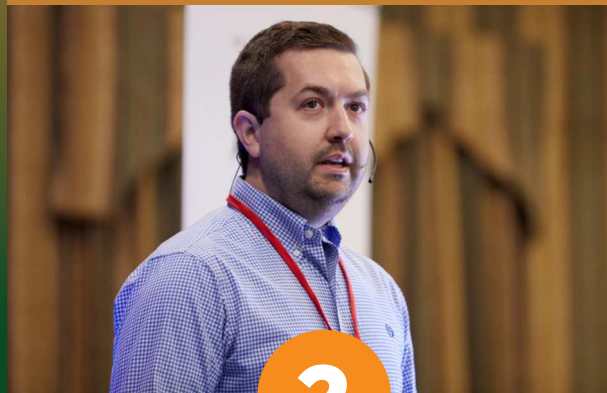
## GAIN ACTIONABLE INSIGHTS ON HOW TO STAND OUT AND GROW IN A CROWDED MARKET.

- Discover case studies and transformation journeys, full of lessons learned and practical takeaways on how to optimize your campaigns, value proposition, resources, and ROI.
- Unpack technology trends and hypes to position your own tech and data ecosystem to solve tomorrow's challenges.
- Incorporate best practices on how to empower your teams with tools, knowledge, and skills to focus on creativity and revenue-generating activities for building standards of data definition.

1

## BUILD RELATIONSHIPS WITH THE MOST ENGAGED AND INFLUENTIAL THOUGHT LEADERS IN THE INDUSTRY

- Compare notes and discover which technology solutions will truly accelerate your organization's people analytics capabilities.
- Drive innovation and collaboration across likeminded peers to bring People Analytics to the forefront of HR Strategy.
- Tap into real-life experience from people analytics leaders across various industries including healthcare, manufacturing, travel, hospitality and so much more!



2



## DISCOVER POTENTIAL PARTNERS THAT WILL HELP YOU TAKE YOUR BUSINESS TO THE NEXT LEVEL

- Identify which innovative technology solutions will accelerate your organization's digital marketing capabilities.
- Analyze the vendor landscape with your peers to separate hype from value-adding offerings.
- Adopt best practices on sourcing and working with partners to achieve long-term sustained growth.

3





# What's On the Agenda?

- » **Re-establishing the value of marketing** as a growth centre vs cost centre and aligning your business for digital growth
- » **Setting up an agile marketing organization** and structuring efficient empowered teams
- » **Analysing most impactful GenAI use cases** and moving them through pilot and execution stage
- » **Orchestrating omnichannel marketing campaigns** and continuous customer experience
- » **Scaling hyper-personalisation** in the age of first-party data
- » **Enabling sales and business development teams** through automation and AI-powered tools
- » **Scaling content creation abilities** and measuring content effectiveness across channels
- » **Adapting to the future of SEO, SEM and paid media** to maintain reach and engagement
- » **Making better data-driven decisions** rooted in strong attribution strategies and insight maturity



# AGENDA - DAY 1

Wednesday, October 9, 2024

## 7:30 AM REGISTRATION & NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

## 8:30 AM WELCOME FROM THE EVENT DIRECTOR

**Taya Prokopenko**, Head of Content, Digital Marketing for Financial Services, **Strategy Institute**

## 8:40 AM OPENING REMARKS FROM THE CHAIRPERSON

Live Polling: Assessing Digital Marketing Predictions - True or False?

**LeAnita Ragland-Brooks**, Former Managing Director & Vice President, Strategic Relationship Management, **Prudential Financial**

## 9:00 AM KEYNOTE PRESENTATION: SUSTAINABLE INNOVATION AT SCALE

### Fostering a Culture of Innovation and Creating a Framework for Experimentation to Drive Incremental Growth and Competitive Advantage

The rapid integration of technological advancements is reshaping digital marketing in financial services, with generative and predictive AI playing a key role in analyzing customer behavior, optimizing advertising strategies, and forecasting ROI. Discover how to foster innovation responsibly and demonstrate rapid results. Source practical tips to:

- Identify high-impact business use cases for innovation that enhance bottom-line results and customer experiences.
- Strike a balance between demonstrating immediate value and maintaining an ethical approach.
- Secure budgetary support for experimentation and effectively measure its impact and progress

*Amplify your ability to harmonize radical innovation with scalability to ensure your business remains dynamic and adaptable.*

## 9:30 AM KEYNOTE PANEL DISCUSSION: GROWTH MARKETING STRATEGY

### Establishing Marketing at The Center of Your Business Strategy to Lead Your Organization to Sustainable Growth

Facing increased pressure to prove their value, marketing leaders must place their function at the forefront of business strategy as a growth center, collaborating with the organization on a shared growth strategy. Leverage innovative growth marketing techniques to drive scalable growth. Take away specific solutions to:

- Identify growth opportunities and foster collaboration across the organization, breaking free from marketing silos.
- Utilize data and analytics for informed strategic decisions and promote a culture of data-driven decision-making.
- Adopt agile marketing methods for rapid testing and iteration of strategies, enabling continuous optimization and adaptation to market dynamics.

*Optimize your organization to harness the full potential of growth marketing to position marketing as a strategic driver of sustainable growth and competitive advantage.*

**Judy Edelson**, Chief Marketing Officer, **Apple Bank**

**Alejandra Denda**, Chief Marketing Officer, **The Federal Savings Bank**

**Donna Doleman Dickerson**, Chief Marketing Officer, **University of Michigan Credit Union**

**Vlad Moldavskiy**, Head of Marketing & Growth, **Halo Investing**

## 10:10 AM INDUSTRY EXPERT PRESENTATION: MARKETING INSIGHT AND ANALYTICS

### Increase Insight Maturity of Your Organization to Measure Success, Drive Growth, and Maximize Customer Experience

Measuring marketing performance and tracking attribution is essential for effective budget management, especially within the financial services and products ecosystem, where it can be challenging. Leverage advanced analytics to identify the most effective marketing methods and optimize campaigns for maximum engagement, conversion, and sales. Develop a blueprint to:

- Consolidate fragmented data across your marketing technology stack.
- Bridge the data and analytics skills gap in your organization using powerful insight technologies.
- Use predictive models to simulate and measure the impact of your marketing and advertising campaigns.

*Improve how your advertising and marketing campaigns reach and impact audiences across multiple channels to maximize ROI.*

## 10:40 AM SPEED NETWORKING

## 10:50 AM REFRESHMENTS BREAK & EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS



# AGENDA - DAY 1

Wednesday, October 9, 2024

## 11:30 AM PANEL DISCUSSION: AI-DRIVEN TRANSFORMATION

### Driving Your Organization Towards Rapid and Responsible Exploration of AI Capabilities for Process Optimization, Scaling, and Customer Journey Improvements

AI-powered technologies have revolutionized marketing and creativity, with 2024 witnessing mass testing and adoption. Discover how early adopters discern the most impactful business use cases, separating reality from hype and swiftly involving relevant internal stakeholders. Adopt best practices to:

- Navigate a use case from pilot setup to execution stage.
- Address privacy and bias concerns within internal teams and external customers.
- Identify opportunities to upskill your teams with AI-powered tools.

*Transform your AI capabilities to unlock new levels of efficiency, innovation, and competitive advantage in your marketing strategies.*

**Adam Fischer**, Chief Product and Innovation Officer, **Clearcover**  
**Nina Edwards**, Vice President, Emerging Technology & Innovation, **Prudential Financial**  
**Ben Udell**, Senior Vice President, Digital Innovation, **Lake Ridge Bank**

## 12:10 PM CASE STUDY: COMMUNITY BANK TRANSFORMATION

### Setting Up Your Business for Sustainable Growth Through an Omnichannel Marketing Strategy

This is a story of how a community bank doubled its net income and achieved a growth rate of over 20% in the last 5 years through a marketing strategy transformation. Develop a sophisticated data-first omnichannel marketing approach to increase your market share and attract a new generation of customers. Walk away with an action plan on:

- Structuring your marketing organization and building teams for scalable growth.
- Create differentiation and a solid value proposition in a competitive, slow-growth market.
- Leveraging partnerships to appeal to younger generations.

*Bolster your marketing as a core function to drive sustainable business growth.*

**Danielle Bateman Gironde**, Chief Marketing Officer, **Midwest BankCentre**

## 12:40 PM INDUSTRY EXPERT PRESENTATION: CUSTOMER TRUST AND LOYALTY

### How Should You Approach Customer Trust to Build Deeper Relationships in a Cookie-Less World?

Establishing and maintaining customer trust is crucial for achieving customer primacy, especially in an era marked by heightened privacy concerns and widespread use of AI-generated content. Build customer trust through robust first and zero-party data strategies, fostering a mutually beneficial value exchange between your brand and customers. Create a roadmap to:

- Cultivate relationships with customers centered around data and value exchange.
- Consolidate first-party data to create a comprehensive understanding of your customers and effectively target the right audience.
- Design meaningful personalized interactions to improve customer engagement and loyalty

*Optimize your data strategy to enhance customer trust and nurture long-term loyalty.*

## 1:10 PM NETWORKING LUNCH

## 1:10 PM INDUSTRY EXPERT LUNCH & LEARN

### TRACK A: DIGITAL CX AND PERSONALIZATION

### TRACK B: CONTENT AND ADVERTISING STRATEGY

## 2:10 PM CASE STUDY: ENABLING PERSONALIZATION

### Enhancing the User Experience Through a Robust Personalization Strategy

Northern Trust embarked on a journey to implement personalization capabilities, aiming to deliver unique experiences to their customers at scale. This case study provides insights to help you develop a roadmap for personalization within your organization. Take back to your office strategies to:

## 2:10 PM CASE STUDY: PAID ADS ON META

### Driving Conversions with Paid Ads Through Focusing on Metrics That Matter Most

The Retirement Wealth Academy (an exclusive Brookstone Capital offering) has discovered methods to boost ROI on paid ads by lowering CRP. Optimize your paid ad results across the Meta platform through practical tips from lessons learnt on how to:



# AGENDA - DAY 1

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- Assess the impact on your business setup and drive effective change management.
- Use existing data in a more compelling way to enhance personalization.
- Optimize the placement of tools and data to maximize their capabilities.

Master a roadmap for increasing personalization maturity in your organization to enhance your digital experience.

**Sheryl Markov**, Executive Vice President, Head of Digital, Design & Delivery, **Northern Trust Corporation**

- Adopt best practices and leverage tools to drive more qualified results.
- Understand what metrics matter most for your ad campaigns.
- Analyze and interpret data to refine your ad targeting and creative strategies.

Refine your Meta ad strategy to yield the highest possible ROI and conversion rates.

**Jason Lindsay**, Marketing Director, **Brookstone Capital Management**

## 2:30 PM INDUSTRY EXPERT PRESENTATION: A MODERN APPROACH TO CUSTOMER JOURNEY ORCHESTRATION

### Using AI to Improve Customer Experience and Customer Journey Orchestration in Messaging

Traditional campaign segmentation and customer journey mapping are no longer sufficient to differentiate in today's saturated market. Elevate your approach by leveraging AI-driven customer journey orchestration to ensure every interaction is fresh and relevant to each customer. Source practical tips to:

- Activate customer journey data to deliver a personalized experience.
- Orchestrate omnichannel journeys.
- Optimize performance across channels and touchpoints.

## 2:30 PM INDUSTRY EXPERT PRESENTATION: CONTENT STRATEGY OPTIMIZATION

### Create Content that Captivates Audiences, Builds Trust, and Drives Conversion Within a Highly Regulated Industry

For a truly impactful content strategy, it's crucial to address the unique needs and questions at each stage of the customer journey. Tailor your approach to enhance relevance and messaging impact, fostering relationships built on value and trust. Achieve a step-by-step action plan to:

- Craft content tailored to every stage of the customer journey.
- Measure content success across different stages of the customer journey.
- Embrace cutting-edge AI content creation tools to scale your content capabilities.

*Amplify your real-time decisioning tools to deliver personalized conversations at scale.*

## 3:00 PM FIRESIDE CHAT: DIGITAL TRANSFORMATION POST-PANDEMIC

### Enhancing Member Acquisition, Experience and Value Through a Digital-First Approach

Alliant Credit Union has been gradually transforming into a fully digital financial institution since 2014 with a phase-out of all branches in 2020, revealing new member advantages. Support your digital growth efforts through uncovering valuable lessons learnt during Alliant's journey and take away practical tips on how to:

- Embrace data-driven decision-making to drive customer growth.
- Foster a culture of innovation, agility and digital literacy to adapt to rapidly changing technologies and member expectations.
- Continuously enhance service offerings with customer-centricity in mind.

*Leverage your digital channels to enable more personalized marketing efforts to increase engagement and conversion based on user behavior and preferences.*

**Sumeet Grover**, Chief Digital & Marketing Officer, **Alliant Credit Union**

*Increase your content's effectiveness through a customer-centric approach, supported by AI-powered tools, to enhance engagement and drive conversions*

## 3:00 PM CASE STUDY: DATA-DRIVEN CONTENT STRATEGY

### Increasing Engagement, Traffic and Satisfaction Through Data-Driven Audience Personas

Unlock the potential of your content strategy by leveraging data - driven audience personas to boost engagement, traffic, and customer satisfaction. This case study will provide practical takeaways on how to:

- Redesign your marketing program and department to be audience-centric.
- Develop detailed audience personas based on data insights that you already have across multiple channels.
- Determine the right place for all your content and audiences, setting the right priorities

*Harness the power of your existing customer data to create content that attracts and deeply connects with your audience, fostering loyalty and growth*

**Kate Purdy**, Vice President, Marketing & PR, **Signal Financial Federal Credit Union**



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## 3:20 PM INDUSTRY EXPERT PRESENTATION: PAID ADVERTISING INTELLIGENCE AND MEASUREMENT

### Optimize ROI on Your Paid Media Campaigns Through Intelligent Measurements

Utilizing intelligent measurements can revolutionize your approach to paid advertising, enabling you to capture your customers' attention with each campaign. Explore advanced measurement techniques and tools that empower you to optimize targeting, messaging, and budget allocation, maximizing the impact of your paid media investments. Adopt best practices to:

- Analyze paid campaign performance holistically to uncover insights.
- Determine key metrics to optimize your campaigns based on your business goals.
- Assess the suitability of intelligent tools for your business needs.

*Enrich your paid advertising intelligence and measurement to boost ROI and drive success in your finance marketing campaigns*

## 3:50 PM REFRESHMENTS BREAK & EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS

## 4:20 PM INDUSTRY VERTICAL BREAKOUT DISCUSSIONS

Join vertical-specific marketing strategy and execution discussion groups to uncover how your peers are prioritizing marketing budgets, deciding their channel strategy, and transforming marketing operations.

- BANKING
- INSURANCE
- WEALTH AND ASSET MANAGEMENT
- CREDIT UNIONS
- LENDING AND SAVINGS
- CREDIT CARDS AND PAYMENTS

## 5:20 PM CASE STUDY: BUILDING AN AWARD-WINNING MARKETING TEAM

### Giant Slayers: Unlocking 10x Growth with Limited Resources

Learn from TAB Bank's journey to record-breaking revenue by revolutionizing its marketing department. Increase ROI and reduce marketing waste through innovative, high-impact methods for achieving exponential growth despite having constrained resources. Take back to your office strategies to:

- Leverage unique insights, streamline operations, and capitalize on niche markets.
- Create and structure a scalable growth engine for teams of any size.
- Build trust within your organization to secure additional resources as you grow.

*Reduce marketing waste by implementing innovative, high-impact approaches to achieve exponential growth despite limited resources.*

**John Huntinghouse**, Vice President, Marketing, **TAB Bank**

## 5:50 PM END OF DAY ONE SUMMARY & CLOSING REMARKS

**LeAnita Ragland-Brooks**, Former Managing Director & Vice President, Strategic Relationship Management, **Prudential Financial**

## 6:00 PM EVENING RECEPTION: ENJOY GREAT CONVERSATION, MUSIC & NETWORKING



# AGENDA - DAY 2

Thursday, October 10, 2024

## 7:30 AM DAY TWO REGISTRATION & NETWORKING BREAKFAST: BUILD COMMUNITY CONTACTS

## 8:00 AM LEADERS' CIRCLE (C-LEVEL INVITATION-ONLY SESSION)

### Reflecting on 2024 and Setting Strategic Priorities to Stay Ahead of the Evolving Technological Landscape

Don't miss this exclusive session designed for C-level financial services leaders. Bringing together 25 senior marketing and digital executives to drive organizational success and business impact in 2025. Take away specific solutions to:

- Identify the impact of key trends on fellow financial services CMOs and how that will shape their strategy going forward.
- Plan your next steps for delivering exceptional growth and customer experiences.
- Benchmark investment priorities and success metrics.

*Achieve a winning vision and actionable strategies to ensure your teams excel, guided by industry-leading experts.*

## 8:00 AM INDUSTRY EXPERT MORNING WORKSHOP

## 9:00 AM DAY TWO OPENING REMARKS FROM THE CHAIRPERSON

**LeAnita Ragland-Brooks**, Former Managing Director & Vice President, Strategic Relationship Management, **Prudential Financial**

## 9:10 AM CASE STUDY: MARKETING ANALYTICS AND DATA CAPABILITIES

### *Decreasing Cost Per Acquisition and Increasing Customer Value Through a Data-Driven Marketing Strategy*

TradeStation's shift from traditional to fully digital marketing allowed them to optimize marketing campaigns across all channels in real-time. Maximize your campaign ROI by developing robust marketing data capabilities using insightful strategies. Develop a blueprint to:

- Organize tracking for all multi-channel campaigns.
- Build a predictive algorithm for understanding customer value and revenue maximization.
- Continuously enhance data capabilities for more effective optimization.

*Adapt your data-driven marketing strategy to reduce costs and boost customer value.*

**Marco Carruciu**, Vice President, Marketing, **TradeStation**

## 9:40 AM INDUSTRY EXPERT PRESENTATION: THE TALENT SHOWDOWN

### Building AI-Enabled Marketing Teams to Enable Competitive Advantage Starting Now

In 2024, AI's mass adoption and the rise of GenAI are reshaping organizational and talent strategies. Adapt your talent strategy to integrate AI effectively and boost ROI, with 22% of CMOs planning AI-driven staff replacements. Master the success factors to:

- Align skill sets with your business goals and priorities.
- Source talent capabilities internally and externally.
- Cultivate a culture of continuous learning and empathy for navigating the evolving workplace.

*Transform your organization and enhance marketers' skills to meet the demands of AI-driven strategies and maximize ROI.*

## 10:10 AM FIRESIDE CHAT: THE FUTURE OF SEARCH ENGINE MARKETING

### Creating Innovative and Efficient SEM Strategies to Enhance Your Campaign Performance

The realm of SEM marketing continues to evolve alongside emerging technologies and consumer trends, presenting financial services businesses with new opportunities and challenges. Streamline your SEM campaigns and enhance ROI. Create a roadmap to:

- Adapt bidding strategies for ROAS and value-based optimizations.
- Prepare for Search Generative Experience / AI.
- Understand the convergence of SEO and SEM strategies.
- Explore search in non-traditional places, like social media.

*Achieve effective and sustainable SEM strategies to maintain a competitive edge.*

**Matt Lattman**, Senior Vice President, Card Acquisition Marketing, **Discover Financial Services**

## 10:50 AM REFRESHMENTS BREAK & EXHIBITOR LOUNGE: ATTEND VENDOR DEMOS & CONSULT INDUSTRY EXPERTS



# AGENDA - DAY 2

Thursday, October 10, 2024

## 11:30 AM INDUSTRY EXPERT PRESENTATION: MARKETING TECHNOLOGY ECOSYSTEM

### Orchestrating Profitable Digitally Enabled Growth Across Functions

Cross-functional collaboration drag is a major hurdle in achieving customer-led growth and a unified commercial strategy, affecting over 80% of leaders. Evolve your Martech ecosystem and marketing practices to address future challenges. Source practical tips to:

- Modernize legacy technology for synergy between systems, processes, and teams.
- Identify workflow changes and process inefficiencies.
- Align rules, roles, and processes to support desired culture change.

***Bolster meaningful change to unlock operational efficiency and digital growth throughout your business.***

## 12:05 PM ROUNDTABLE DISCUSSIONS (PLEASE SELECT ONE)

Break into smaller groups of approximately 10 industry peers to work through a series of questions and challenges. Share knowledge on a particular topic that is most critical to your role and business

- GENERATIVE AI:** The Most Impactful Use Cases to Create a Better User Journey
- WEBSITE REVAMP BEST PRACTICE :** Improving The Customer Journey and Ensuring a Smooth Redesign/Rebrand Process  
**Kate Purdy**, Vice President, Marketing & PR, **Signal Financial Federal Credit Union**
- EMAIL MARKETING:** Innovating a Traditional Channel to Improve Engagement and Drive Conversion
- UNLOCKING MARKETING EXCELLENCE :** Building and Leading an Empowered Team for Success  
**Mark Reese**, Marketing Director, **Tri-Merit**
- GROWTH THROUGH PARTNERSHIPS:** Leveraging Strategic Partnerships to Attract Customers and Enhance Customer Value
- CUSTOMER-CENTRIC MARKETING:** Establishing Trust and Building Deeper Customer Relationships Through a Customer-centric Marketing Strategy  
**Led Lisa Zakrzewski**, Chief Marketing Officer, **Leverage Retirement**
- SALES ENABLEMENT:** Utilizing Workflow Automation and Leveraging GenAI to Enable Sales Teams to Focus on High-impact Activities  
**Leonard Green**, Vice President, Customer Success, **Northwestern Mutual**
- CLOSING THE MARTECH GAP:** Organizational Change to Get the Most Out of Your Martech Stack

## 1:05 PM NETWORKING LUNCH: DELVE INTO INDUSTRY CONVERSATIONS

## 2:05 PM FIRESIDE CHAT: SOCIAL MEDIA MARKETING

### Leveraging Social Channels to Build Trust and Increase Customer Engagement in Times of Rising Consumer Concern

AI's synergy with social media for personalization and insights is clear, yet challenges arise with increasing concerns over AI-generated content. Enrich your social media strategy for better engagement and revenue, prioritizing integrity, authenticity, and transparency. Develop a blueprint to:

- Produce authentic data-driven campaigns that deliver results.
- Combat social fatigue and improve customer experience.
- Scale campaigns across different social channels.

***Amplify your social strategy with AI to enable a deeper human connection with your customers and increase revenue.***

## 2:35 PM CASE STUDY: AUTOMATION AS A GROWTH DRIVER

### Delivering Immediate Business Value Through Enabling Sales and Business Development with Automation

Marketing can immediately add value by using automation to streamline marketing and sales processes. Innovate your lead generation and nurturing as well as your customer engagement without complex IT transformations. Achieve a step-by-step action plan to:

- Evaluate your lead generation and sales processes to eliminate non-value-adding tasks.
- Leverage automation for lead qualification and valuable customer insights.
- Collaborate with your organization to implement changes.

***Improve your automation processes to drive efficiency, lead quality, and customer engagement.***

**Anish Sharan**, Head of Digital Transformation, **Pritzker Private Capital**

## 3:05 PM CASE STUDY: THE JOURNEY TOWARDS CUSTOMER-CENTRIC MARKETING

### Transforming Your Marketing Organization to Establish Trust, Increase Loyalty and Support Growth

Revolutionize your marketing strategy through a comprehensive customer-centric approach that will guarantee sustained growth. This case study will demonstrate the tangible learnings from the journey of Leverage Retirement on:



## AGENDA - DAY 2

Thursday, October 10, 2024

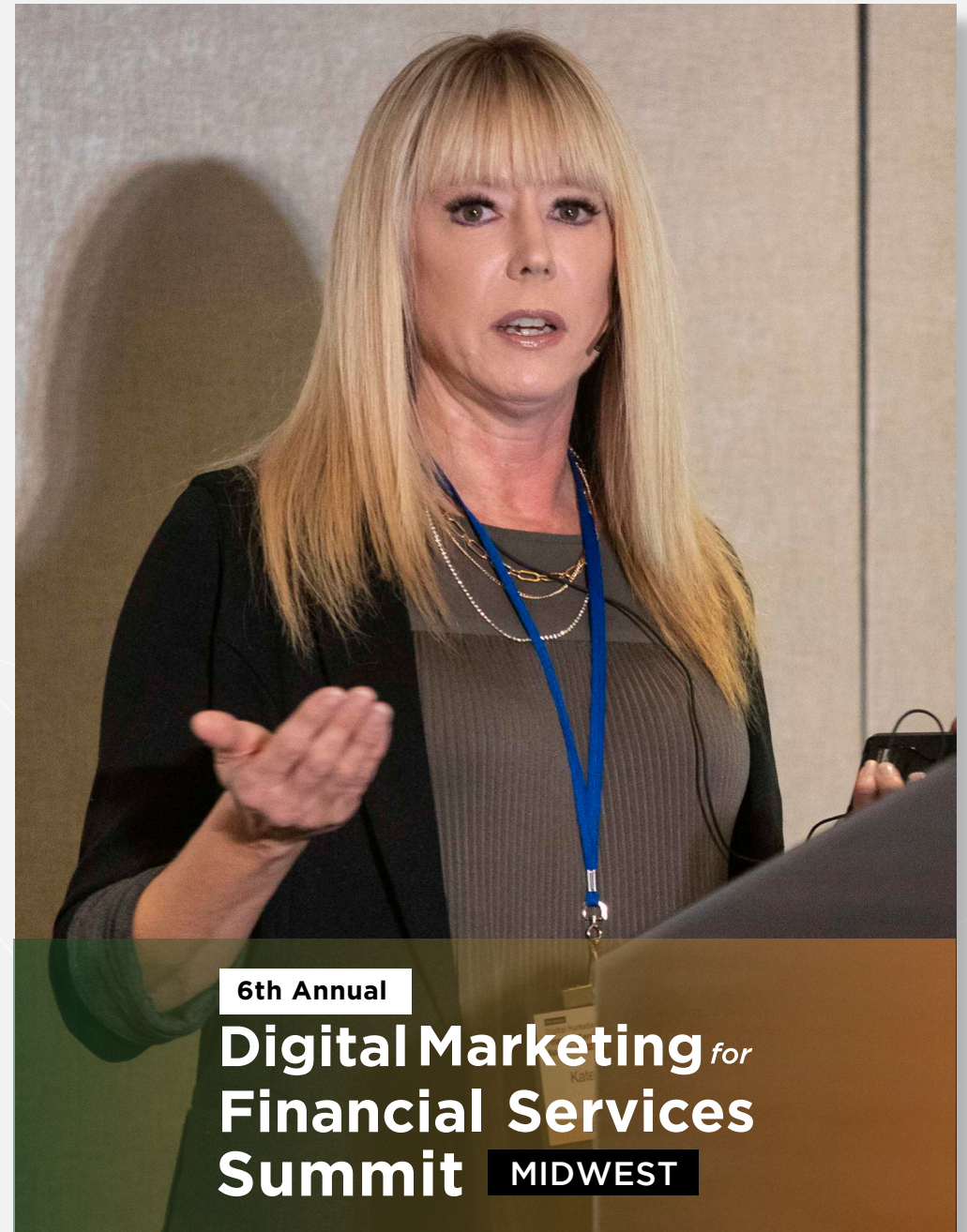
- Utilizing data-driven personalization to tailor interactions and meet individual customer needs through advanced data analytics.
- Achieving organizational alignment by engaging employees and ensuring internal processes are aligned with customer-centric goals.
- Leveraging emerging technologies, such as AI, to innovate and enhance customer experiences, staying ahead of market trends.

*Embark on a journey towards prioritizing your customers in every aspect of your marketing strategy, ensuring deeper connections and sustained growth.*

**Lisa Zakrzewski**, Chief Marketing Officer, **Leverage Retirement**

### 3:45 PM CLOSING REMARKS & END OF SUMMIT

**LeAnita Ragland-Brooks**, Former Managing Director & Vice President,  
Strategic Relationship Management, **Prudential Financial**



6th Annual

**Digital Marketing** *for*  
**Financial Services**  
**Summit** **MIDWEST**





“

*“This event has provided a great opportunity to network with other digital marketers and learn about timely trends and topics to take back to my team”*



“

*“Overall, I loved all the topics, it’s very relevant to what’s going on in the world with digital marketing.”*



“

*“The breakout sessions were so helpful to identify blind spots when sharing current digital strategies. It was critical to speak to other digital marketers about the current challenges our industry faces.”*



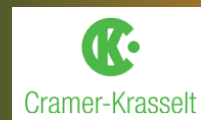
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*“I’ve been to digital marketing conferences before where there are a lot of great ideas that I can’t do because of the limitations within the financial industry. So, this conference is great for marketing tactics specific to my work.”*



“

*“Great to get a better sense of what companies in the financial sector are trying to accomplish with digital marketing and what competition our clients may be facing ... The speeches and panels have been very helpful ... I’ve appreciated the more actionable insights given specifically, like the input on attributions and shared thoughts on Instagram.”*



“

*“Encouraging to see innovative and creative ways to solve the issues, constraints, and challenges in a highly regulated industry. It’s nice to get out of your comfortable home environment to meet peers’ fact to face, who have new and inspiring ideas.”*



6th Annual

# Digital Marketing *for* Financial Services Summit

MIDWEST

October 9-10, 2024  
Voco Chicago Downtown

## How to Register

### IN-PERSON PASS

**FULL TWO-DAY ACCESS:**

Take advantage of keynote sessions, panel discussions, case studies, interactive roundtables and one week of pre-event networking via our dedicated platform

**FACE-TO-FACE NETWORKING:**

Connect and build valuable relationships with our audience of thought leaders

**5-STAR TREATMENT:**

Enjoy the complimentary breakfast, lunch, and cocktail reception, all within one stunning location

**EXPO HALL:**

Form lasting business partnerships, test drive the latest solutions and gather exclusive content from industry-leading experts

**SPEAKER PRESENTATIONS:**

Take home PowerPoints and white papers addressing your biggest challenges

**ON-DEMAND ACCESS:**

Conveniently rewatch any session for up to 3 months after the event

**Early Bird Offer**  
Expires on July 26th, 2024 **\$1,195 USD**

**Regular Price** **\$1,695 USD**

### VIRTUAL PASS

**TWO-DAY LIVE STREAM ACCESS:**

Tune into keynote sessions, panel discussions and case studies with real-time Q&A from the comfort of your home

**VIRTUAL NETWORKING:**

Connect and build valuable relationships with our audience of thought leaders through topic message boards, interactive roundtables, and one-on-one discussions via our private messaging tool

**VIRTUAL EXPO HALL:**

Form lasting business partnerships, test drive the latest solutions and gather exclusive content from industry-leading experts

**SPEAKER PRESENTATIONS:**

Take away PowerPoints and white papers addressing your biggest challenges

**ON-DEMAND ACCESS:**

Conveniently rewatch any session for up to 3 months after the event

**Early Bird Offer**  
Expires on July 26th, 2024 **\$895 USD**

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To check if you are eligible for a group rate, please contact:  
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