

POTENTIAL TOPICS FOR DISCUSSION

- **Organizational Design & Planning**
 - Where does marketing fit on the org chart?
 - Staffing levels?
 - What roles/responsibilities?
 - What to outsource vs. retain?
 - Budgeting and planning
 - How can we be positioned as a strategic partner for other departments?
- **Member Acquisition & Onboarding**
 - What are you doing with regards to business development? SEG Development? Referral campaigns?
 - What are your goals?
 - Segmentation strategies?
 - What are your activities with regards to onboarding new members?
- **Media/Marketing Mix**
 - Social Media – What channels are being used? What’s working? How managed? How measured?
 - Traditional and Mass Marketing
 - In-branch
 - Channels (mobile, ATM & ITM locations, etc.)
 - Community events
 - Content
- **Product Marketing**
 - Deposits
 - Loans
 - Other member services
- **Measurement**
 - Tracking effectiveness
 - Demonstrating strategic impact
- **Technology**
 - Marketing automation platforms
 - CRM/Core systems
 - Campaign management calendars
- **Other Topics**
 - Who ‘owns’ the website?
 - Member rewards/relationship pricing programs
 - Vendors being used/considered
 - Others?