

Callahan & Associates

May 28, 2026



# How To Make Marketing The Growth Engine For Your Credit Union

Callahan Client Webinar Series



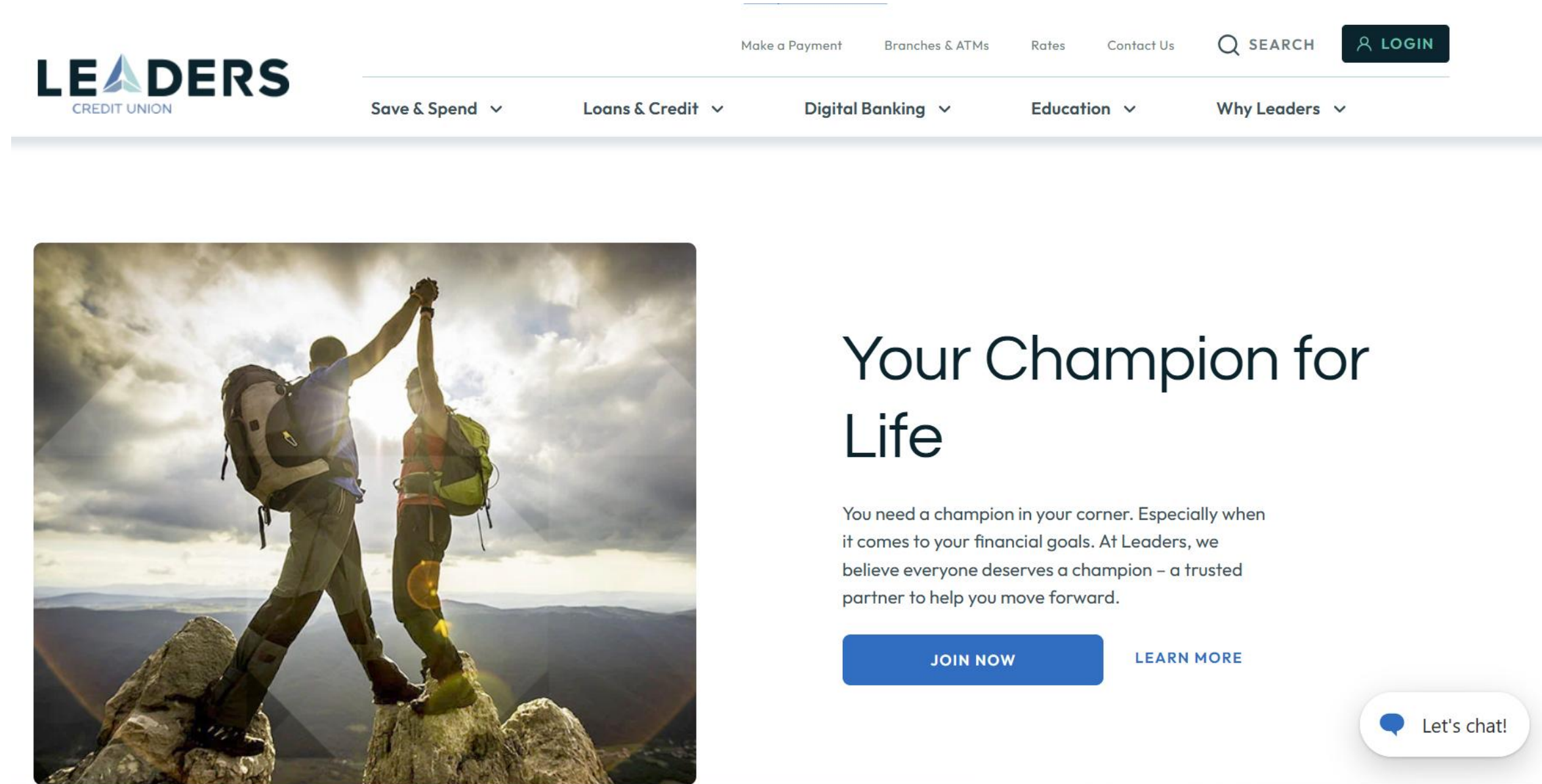
# Our Speaker



**Leigh Anne Bentley**  
Chief Marketing Officer  
Leaders Credit Union

# About Leaders Credit Union

- Jackson, TN
- Approx. \$1.3B in assets
- 90,000 members
- 226 FTEs
- 10 branches



The screenshot shows the website for Leaders Credit Union. At the top left is the logo "LEADERS CREDIT UNION". To the right of the logo is a navigation bar with links: "Make a Payment", "Branches & ATMs", "Rates", "Contact Us", "SEARCH", and "LOGIN". Below this is a secondary navigation bar with dropdown menus for "Save & Spend", "Loans & Credit", "Digital Banking", "Education", and "Why Leaders". The main content area features a large image of two hikers on a mountain peak, one helping the other up. To the right of the image is the headline "Your Champion for Life" and a sub-headline: "You need a champion in your corner. Especially when it comes to your financial goals. At Leaders, we believe everyone deserves a champion – a trusted partner to help you move forward." Below the text are two buttons: "JOIN NOW" and "LEARN MORE". In the bottom right corner, there is a chat bubble that says "Let's chat!".

# The Challenge/Opportunity

- As credit unions grow & evolve, **structure can be a strategic advantage** or a **silent constraint**.
- When it comes to growth, **few teams carry more weight than marketing**.
- How credit unions **organize their marketing function** directly **shapes growth and member engagement**.



# Think like a Credit Union, Function Like an Ad Agency

- We have **ad agency backgrounds**
- We **produce everything in-house**
  - print, digital, social media, website
  - produce our own TV & radio spots
  - launched a Podcast
- Take **partner with the community**
  - manage SEG relationships
  - promote financial wellness
  - lead reality fairs at schools
  - serve on boards
  - cover specific areas across 22-counties

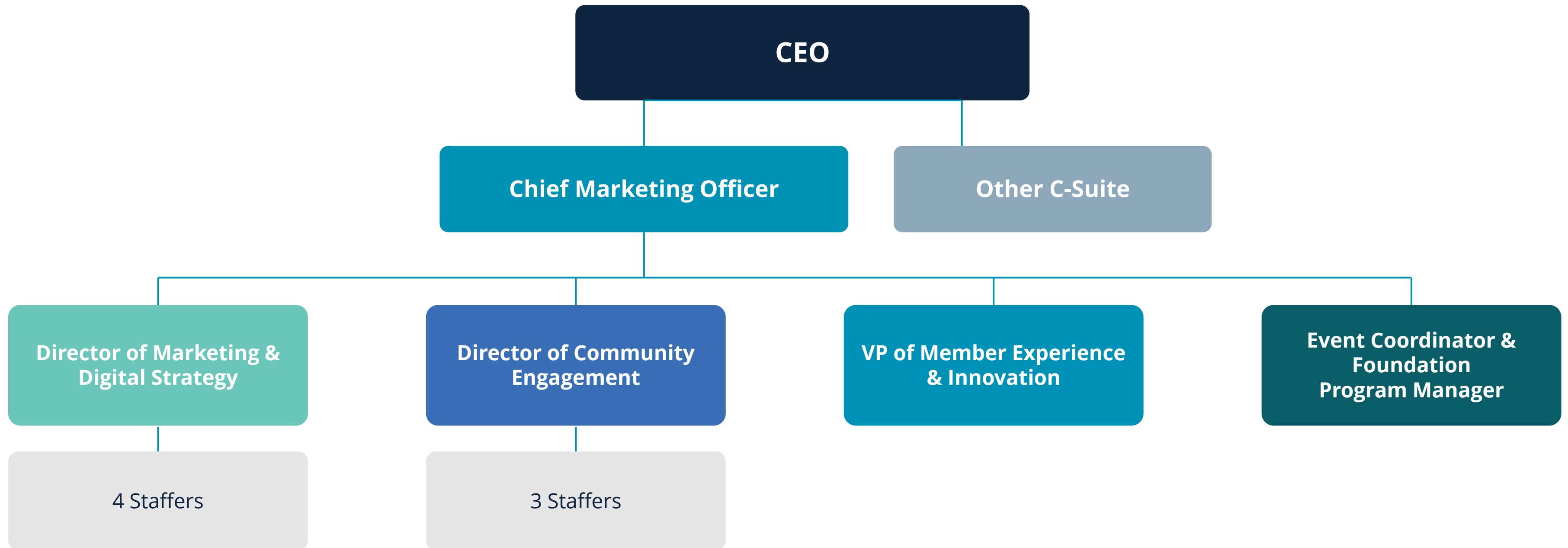


# The Solution – An Agency Structure

- Three focus areas:
  - **Traditional marketing**
  - **Community engagement**
  - **Member experience and innovation**
- Recent expansion:  
Education Foundation



# The Marketing Org Chart at Leaders



# Growing Bigger & Better

- Marketing's growth has **reflected the credit union's growth.**
- Credit union growth: \$330 million to **\$1.3 billion in assets**
- Marketing team growth: 3 people to **13 full-time**

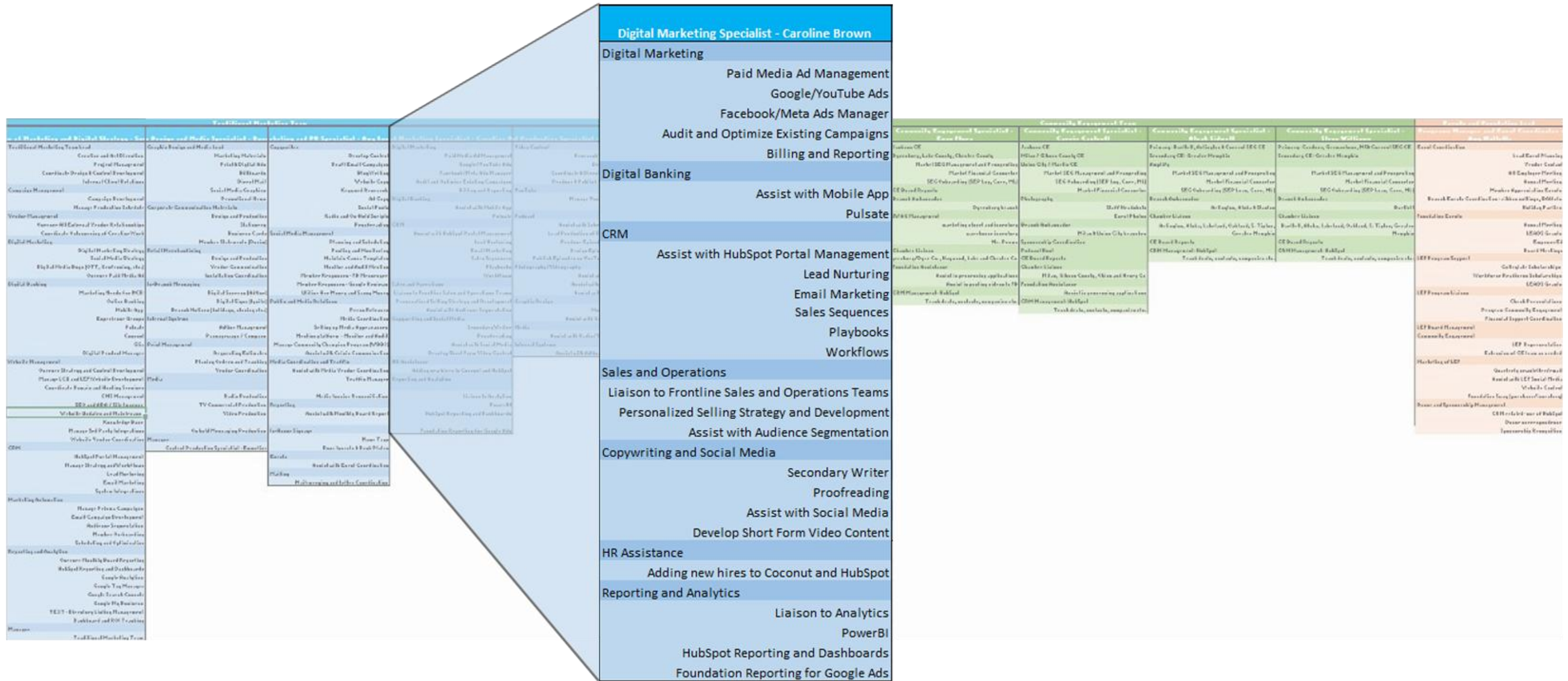


# Defining Roles and Responsibilities

- With growth, we have **added more platforms and outreach.**
- Everyone knows **what they handle.**

Traditional Marketing Team				Member Experience and Innovation		Community Engagement Team				Events and Foundation Lead	
Head of Marketing and Digital Strategy - Susan	Graphic Design and Media Lead	Copywriter	Marketing Specialist - Creative	Video Specialist - Creative	PIE and Innovation - Branding & Analytics	Director of Community Impact - Steve	Community Engagement Specialist - Kuan	Community Engagement Specialist - Corrie	Community Engagement Specialist - Aliah	Community Engagement Specialist - Steve	Program Manager and Event Coordinator - Ann
Traditional Marketing Team Lead	Marketing Materials	Copywriting	Digital Marketing	Video Content	Analytics Meetings	Community Engagement Lead	Jackee CE	Jackee CE	Primary: Darrell, Arlington & Corral SEG CE	Primary: Cordeau, Greenhouse, MSH Corral SEG CE	Event Coordination
Central and Ad Direction	Print & Digital Ads	Direct Mail	Print & Digital Ads	Direct Mail	PIE Groups	Community Engagement Strategy	Dyrrberg, Luke, Conley, Chrystal Conley	Milae / Gibson Conley CE	Secondary: CE - Greater Memphis	Secondary: CE - Greater Memphis	Lead Event Planning
Project Management	Billboards	Direct Mail	Direct Mail	Direct Mail	Process Improvement	Strategy Oversight Management	Market SEG Management and Programming	Union City / Memphis CE	Market SEG Management and Programming	Market SEG Management and Programming	Vendor Coordination
Coordinate Central Development	Website Copy	Social Media Graphics	Website Copy	Website Copy	Public Relations	Reporting and ROI Tracking	Market Financial Counselor	Market SEG Management and Programming	Market Financial Counselor	Market Financial Counselor	All Employee Meeting
Internal Client Relations	Promotional Items	Corporate Communication Materials	Digital Marketing	Video Content	New Initiatives Ideas	SEG Partial Development	SEG Ombudsman (SEP Log, Corr, MI)	SEG Ombudsman (SEP Log, Corr, MI)	SEG Ombudsman (SEP Log, Corr, MI)	SEG Ombudsman (SEP Log, Corr, MI)	Annual Meeting
Computer Management	Member Signatures (Digital)	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Brand Training - In-store on-site	CRM Management	CE Board Reports	Market Financial Counselor	Market Financial Counselor	Market Financial Counselor	Member Appreciation Events
Manager - Production Submits	Corporate Communication Materials	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Member Experience Journey	CE Training	Branch Ambassador	Market Financial Counselor	Market Financial Counselor	Market Financial Counselor	Branch Event Coordination - ribbon cutting, B&H etc
Vendor Management	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	January Mapping	Advisory Boards	Dyrrberg branch	Staff Headshots	Staff Headshots	Staff Headshots	Holiday Parties
Oversee All External Vendor Relationships	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Website, Mobile app, other Channels	Marketing	SWAG Management	Event Photos	Event Photos	Event Photos	Foundation Events
Coordinate Outsourcing of Creative Work	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	In-store / Drive-thru Experience	General	Marketing Alerts and In-store	Branch Ambassador	Branch Ambassador	Branch Ambassador	Annual Meeting
Digital Marketing	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Financial Education	Mr. Proxm	Spencerhip Coordination	Spencerhip Coordination	Spencerhip Coordination	LEADS Goals
Digital Marketing Strategy	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	KOPE - Freedom Park	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	EmpowerEd
Digital Media Dept (OTT, Streaming, etc)	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Oversee Paid Media Ad	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Digital Banking	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Marketing Needs for HCR	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Outlet Banking	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Mobile App	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Experiential Groups	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Partners	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Content	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
GLI	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Digital Product Manager	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Oversee Strategy and Central Development	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Manage LCU and LEP Website Development	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Coordinate Domain and Hosting Services	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
CMS Management	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
SEO and ADA / Site Issues	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Website Update and Maintenance	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Knowledge Base	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Manage 3rd Party Integrations	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Website Vendor Coordination	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Manager	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Central Production Specialist - Emerline	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
CRH	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
HakSpel Partial Management	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Manage Strategy and Workflow	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Lead Marketing	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Email Marketing	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
System Integrations	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Marketing Automation	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Manager Primary Campaigns	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Email Campaign Development	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Adverse Segmentation	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Member On-boarding	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Subbranding and Optimization	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Reporting and Analytics	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Oversee Monthly Board Reporting	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
HakSpel Reporting and Dashboards	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Google Analytics	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Google Tag Manager	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Google Search Console	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Google My Business	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
YEXT - Directory Listing Management	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Dashboard and ROI Tracking	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Manager	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings
Traditional Marketing Team	Drugs and Production	Business Cards	Member Signatures (Digital)	Member Signatures (Digital)	Event Groups	Stadler Chair / 7-11	Chamber Liaison	CE Board Reports	CE Board Reports	CE Board Reports	Board Meetings

# Defining Roles and Responsibilities



# Finding the Right Mix of Team members

- The team blends **ad agency backgrounds** with **former branch employees**.
- Our **videographer** started as a universal banker — now she produces video for **marketing, the foundation,** and **the podcast.**



# Purposeful Team Building

- We have **bi-weekly huddles**
  - Book reviews
  - Day in the life, guests
  - What's new in AI
  - Soft Skills
  
- Annual **marketing retreats**
  - Creative agency tours
  - Visit vendors, media outlets
  - Collaborate with fellow credit unions
  - Sporting events



# Even in Marketing, Member Experience Matters

- Every division has its own focus, but the **whole team prioritizes member experience** in everything we do.
- Great marketing sets brand expectations — **front-line staff in branches and on phones deliver the actual experience.**
- The team **meets monthly with sales and lending** to review data and **analytics** to fuel future campaigns.



# Benefits of an Agency Structure/Results & Impact

- There really are two options: **In-house** or **Outsource**
- **Cut costs**  
When the team was smaller, we outsourced some things.
- **We saved from our marketing budget** on podcast production and content marketing. Added an FTE but went from 2 videos a month to 40 hours/week.
- **Move quick**  
We are agile and fast. We can **launch campaigns quicker** than outsourcing it.



# Lessons Learned & Advice for Others

- **Don't rush to scale.** Our growth was organic and fueled by expanding content and markets.
- **Develop Leads** – Traditional and Community Engagement
- **Advocate for your team and justify new positions.** You don't get what you don't ask for. Explain why this positions fits with the strategic plan of your credit union.
- **Talent matters.** Right team members in the right positions.





# Questions?



**Presented by Guest Speaker**

Leigh Anne Bentley, CMO  
Leaders Credit Union