



## Marks & Associates

# Seminars as a Marketing Tool

### When You Have Their Minds, Their Hearts Will Follow

Cold calling is a tough way to generate sales in any business. It is done because we do not have enough leads. Lead generation is a marketing issue. You solve it by improving your marketing, not by weakening your sales with low results cold calling. A better approach is to conduct client / prospect seminars as marketing events. Many firms do this for a very good reason - it works. An easy way to make an event even more effective is to use an outside professional speaker who knows banking and can gain the respect of the attendees with knowledge, professionalism and outstanding speaking skills. Using inside staff or people that know the topic but can't motivate the attendees misses the mark. After all, your goal is to move the attendees to action.

Designed as an education/marketing event, your bank hosts this session for your best customers and prospects. The intent is to sell them more banking services or to get them to move their relationship to your bank. The session can be focused on a range of topics or delivered as a series of sessions.

Possible topics include:

*Fraud: You Can Run But You Can't Hide*

*Cash Management and Why it is Crucial to the Health of Your Firm*

*A Cash Management Update - What is New*

*How Business is Changing Due to the Internet - e-Commerce*

There are many other potential topics.

Bank executives, relationship managers, and key lending officers are encouraged to attend which provides an opportunity to entertain and impress the bank's most sought-after customers and prospects. These sessions can be customized to your bank's specific products and target marketplace.

*Following is a sample outline for the fraud session:*

- I. What are the overall trends in financial oriented crime?
- II. Why is check fraud growing at such an alarming rate?
- III. While quite a bit of fraud does occur from outside criminals, much is perpetrated by internal accounting staff
- IV. How do external criminals get my checks?
- V. Computer theft aided by easy access to passwords
- VI. How can you protect your firm?
  - A. The firm must have separation of accounting duties...if you don't have enough staff internally, then use the bank's products
  - B. Review procedures and physical security
  - C. Protect your checks and invoices
- VII. Whose responsibility is it anyway?
  - A. Things have changed
  - B. UCC changed the landscape on the issue of who is responsible for fraud.
  - C. What must the bank do?

## Seminar for Prospects as a Marketing Tool...continued

- VIII. How can cash management products help prevent or catch fraud?
- A. Account Reconciliation
  - B. Positive Pay
  - C. Sweep Accounts
  - D. Automatic Transfers
  - E. Lockbox
  - F. ACH
  - G. Pay Card Purchase Card
  - H. Automatic Investment
  - I. EDI

There is a strong feeling of identification that develops in a seminar between a good instructor and the attendees. We make sure this "closeness" is transferred to the bank without making the event look like a marketing session. The presentation uses light humor, focuses their attention on the real issues and delivers pragmatic advice for the attendees.