

# MARQUIS

## 2019 User's Conference

### TENTATIVE AGENDA

*Monday, October 21 – Tuesday, October 22*

**Registration Opens Sunday, October 20, 4:00 PM**

**Tuesday, October 22 of the User's Conference will be broken into two tracks within the marketing sessions: strategy sessions and tactical sessions, to give attendees a holistic view of marketing strategies and the best-practices for execution.**

#### **Monday, October 21, Marketing Sessions**

##### **Session 1 - Six Relevant Data Sources to Create Better Connections**

Hear from industry experts about the six sources of data available through Marquis. At the conclusion of this session, you will be able to match your strategy to a data source and understand the power of the reporting platform in terms of gaining shared insight into the data.

##### **Session 2 – Four Segmentation Models for Increased Sales, Deeper Relationships and Stronger Retention**

This session will focus on value scoring, life stage, next-best-product and look-a-like segmentation models to give you knowledge into how to build stronger relationships through the use of the data sets.

##### **Session 3 – Client Quick Fire: Hear from Your Peers – Part 1**

Hear Marquis clients share their success stories over the past year. Learn how you can achieve the same success in your marketing plans!

##### **Session 4 – Prospecting: Intelligent Farming Strategies**

Learn best practices to build your brand using data-based strategies. This session will provide insight and ideas on how to use Marquis tools and what is available in the market to achieve goals and commonly used strategies around data-centric brand building.

##### **Session 5 – Acquisition: How to Turn A Prospect Into a Customer**

This session will provide a methodology of acquiring new customers by understanding segmentation methods, targeting strategies and multi-channel deliverables.

**Welcome Reception – 5:30 PM –7:30 PM**

## **Tuesday, October 22, Marketing Sessions**

### **All Marketing Participants**

#### **Expanding Your Horizon. Consumer Trends from Outside Financial Services**

There are three golden rules of business: Increase customers, increase revenue at the point of sale and increase the frequency of purchase. But, in an industry largely viewed as a commodity, achieving this can appear daunting. We need inspiration. Together, we will step out of our daily routine and look outside for ideas. Join Tony Rizzo, Marquis Chief Marketing and Creative Officer, for this fast-paced sprint and learn how non-financials are achieving the three golden rules of business.

### **Strategy and Tactical Session Tracks**

#### **Strategy Session 1 – Get Onboard! Build A Behavior-Based Onboarding Program to Increase Activation and Product Utilization**

Create lasting connections with new customers by solidifying relationships upfront. This session will focus on best-practices gleaned from executing over 200 onboarding programs each month.

#### **Strategy Session 2 – Increase Customer Engagement**

Customer engagement is critical for long-term profitability. Because our budgets are tight and the expected results are the norm, where do you start? This session will build a path to success by first looking for opportunities on the balance-sheet and creating winning, revenue driven strategies designed to satisfy your executive team while delighting the customer.

#### **Strategy Session 3 – Customer Relationship Expansion**

Gain a better understanding of segmentation, targeting and multi-channel communication tools. During this session, we will demonstrate strategies and tactics we use every day to expand customer relationships.

#### **Tactical Session 1,2 & 3 – Build, Engage and Expand Customer Relationships**

*During Marketing Tactical sessions every attendee will have a laptop available to them and receive hands-on training in the Marquis NEXT Reporting Tool and ExecuTrax.*

#### **Tactical Session 1 – Building Customer Relationships**

Lasting connections with new customers involves building a solid relationship upfront. To do this it's important to develop a clear picture of the audience; including what they look like, how they behave, and which products will be most beneficial to the relationship throughout their journey. This session involves

validating data and using additional sources to aid in modeling strategies.

## **Tactical Session 2 – Engaging Customer Relationships**

Engaging your audience effectively can be accomplished through the use of segmentation. This sessions will provide a better understanding of the perfect target audiences and the multi-channel communication tools most effective for each.

## **Tactical Session 3 – Expanding Customer Relationships**

Expanding the customer relationship becomes less difficult when you have a clear picture of the audience and they're engaged. This session focuses on overlaying that information while focusing on three areas:

- Defending the core of each audience
- Cross selling the proper product mix
- Understanding the look-a-like factor that will present itself as the perfect overlay to use for targeting existing customers who look and behave like your audience but don't have the product mix

## **All Marketing Participants**

### **Client Quick Fire: Hear from Your Peers – Part 2**

Hear Marquis clients share their success stories over the past year. Learn how you can achieve the same success in your marketing plans!

## **Strategy and Tactical Session Tracks**

### **Strategy Session 4 – The Marquis Digital Suite**

Learn about the range of digital products Marquis offers. From emails to text messaging to website monitoring, learn how to leverage digital marketing tools to achieve your marketing goals.

### **Tactical Session 4 – Build, Engage and Expand Customer Relationships (Cont.)**

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**Conference Ends – 4:00 PM**