

# COURSE CATALOG



## ABA Bank Marketing School

**April 26 – May 2, 2025**

Emory Conference Center

Atlanta, GA

## ABA Bank Marketing School



### Grow your bank and your career with ABA Bank Marketing School.

In one dynamic and immersive week, you'll acquire a deeper understanding of strategic marketing and how to align your campaigns with your bank's ROI, profitability and customer experience goals. Our program, taught by some of bank marketing's best, offers the latest strategies and tactics you can immediately put into action.

With this interactive school, you'll build a lifelong career network and kick-start your journey to earning ABA's Certified Financial Marketing Professional (CFMP) certification, the only industry-recognized designation for bank marketers.

### Where can marketing take you?

Register today and find out.

[aba.com/BMS](http://aba.com/BMS)

#### ABA Bank Marketing School Core Competencies



Demonstrate  
Your  
**VALUE**



Develop  
Your  
**STRATEGY**



Know  
Your  
**MARKET**



Understand  
Your  
**AUDIENCE**



Calculate  
Your  
**ROI**



**ABA  
Bank Marketing  
School**

# Orientation and Pre-Recorded Courses

## ORIENTATION

MONDAY  
**April 14**

1:00 PM – 2:00 PM  
Student Orientation

## PRE-RECORDED COURSES

1 Hour  
**Sales & Marketing Alignment I**

1.25 Hours  
**Data & Analytics I**

1 Hour  
**Marketing ROI I**

*All times are in ET.*



# ABA Bank Marketing School

## Daily Schedule

### SATURDAY April 26

5:00 PM – 6:00 PM  
**Welcome and Team-  
Building Exercise**

### SUNDAY April 27

8:00 AM – 10:00 AM  
**Marketing Planning I**

10:15 AM – 12:15 PM  
**Data & Analytics**

1:15 PM – 3:15 PM  
**Profitability I: Bank  
Financial Analysis**

3:30 PM – 5:30 PM  
**Banking on Multicultural  
Consumers**

### MONDAY April 28

8:00 AM – 10:00 AM  
**Marketing Planning II**

10:15 AM – 12:30 PM  
**Brand Intelligence**

1:30 PM – 5:00 PM  
**Marketing ROI II**

### TUESDAY April 29

8:00 AM – 9:30 AM  
**Marketing Planning III**

9:45 AM – 11:45 AM  
**Profitability II: Asset  
Liability Management  
(ALCO)**

12:45 PM – 1:45 PM  
**PR Communications I**

2:00 PM – 4:30 PM  
**PR/Communications II**

4:45 PM – 5:30 PM  
**Best Practices  
Discussion**

### WEDNESDAY April 30

8:00 AM – 9:45 AM  
**Sales & Marketing  
Alignment II**

10:15 AM – 11:45 AM  
**Marketing Risk  
Management**

12:45 PM – 3:00 PM  
**AI in Action: Using  
Innovation to Drive Value  
in Bank Marketing**

3:15 PM – 5:15 PM  
**Content Marketing and  
Management**

### THURSDAY May 1

8:00 AM – 9:30 AM  
**Compliance and  
Marketing I**

9:45 AM – 12:00 PM  
**Compliance and  
Marketing II**

1:00 PM – 5:00 PM  
**Student Group Exercise**

### FRIDAY May 2

8:00 AM – 10:15 AM  
**Student Group  
Presentations**

10:30 AM – 12:30 PM  
**Effective Marketing  
Leadership**

*All times are in ET.*

*Note: This list only reflects concepts covered by the program.  
Course content is subject to change.*

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## ABA Bank Marketing School

# AI in Action: Using Innovation to Drive Value in Bank Marketing

**Instructor: John Hanley, CFMP**

Marketers are at the forefront when it comes to focusing on the customer, building profitable customer value and using new technologies — including the adoption, use and evaluation of AI solutions for your brand.

Deepen your understanding of AI's role in bank marketing with this course. You'll learn how to engage with an expanding array of AI tools within your marketing team and your bank. Explore how AI can transform customer engagement and drive data-centric marketing strategies that deliver a return for your brand in terms of time and customer growth. Through practical, real-world applications and an interactive exercise, you'll learn to use AI tools to craft an innovative marketing pitch for your bank and how to engage with emerging technologies for your marketing career.

### Course Objectives:

After successfully completing this course, you will be able to:

- Understand AI/GenAI fundamentals
- Consider ethical and risk considerations for leveraging AI within your team and your bank
- Identify various use cases within financial marketing
- Demonstrate understanding of prompt design, AI interaction and basic GenAI usage

### Course Content:

- What's beyond ChatGPT
- The demystification of AI/GenAI
- Benefits and use cases in banking and financial marketing
- Shifting consumer perceptions and why that matters
- Ethical considerations for the future of AI of GenAI
- Basics of intelligent prompt design
- Hands-on practice with GenAI

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## ABA Bank Marketing School

# Banking on Multicultural Consumers

**Instructor: David Femi**

Multicultural Americans play an integral role in expenditure growth in the country. The impact of this consumer segment is central to the success of every consumer brand and financial institution in America. During this course, gain insights into how marketing to multicultural consumers can yield incredible results for your bank.


### Course Objectives:

After successfully completing this course, you will be able to:

- Understand the importance of building culturally fluent brands
- Identify best practices for planning and implementing multicultural marketing strategies
- Establish a presence within multicultural and diverse communities

### Course Content:

- The rapidly changing demographics of the country
- Making the multicultural business case internally
- Brand positioning and execution
- Embracing the new majority
- Multicultural growth strategy and story

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**“Great course with very practical content!  
You can tell David is very passionate about  
Multicultural Marketing.”**

— Bank Marketing School Graduate

  
NEW  
COURSE

## ABA Bank Marketing School

# Brand Intelligence

### Instructor: Amber Farley

Your bank has a brand. The long-term value of the bank will depend on the value of that brand. Your ultimate goal should be to establish a unique brand and advance that brand through every internal and external effort of the entire organization. Doing so will strengthen the undercurrent of all other marketing actions and deliverables.

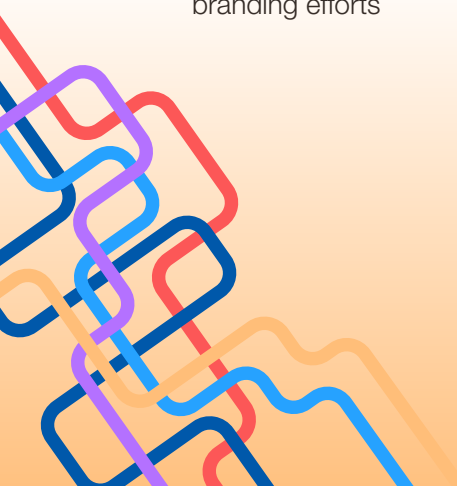
This course will focus on building your passion to manage the brand and elevate your bank's culture and market share.

### Course Objectives:

After successfully completing this course, you will be able to:

- Summarize why brand is important for the bank's long-term success
- Understand how marketing and branding work together
- Audit the bank's existing brand and develop a plan for improvement
- Identify steps involved in the process of developing and building a meaningful and authentic brand for the bank
- Unite and ignite bank employees around a central belief system
- Understand how to advance the brand of the bank across both internal and external channels
- Manage and measure the effectiveness of branding efforts

### Course Content:

- Discussion on what brand is (and isn't) and why it matters
  - Tools to evaluate and audit the existing brand of the bank
  - Proven process to discover, define, deliver and develop the bank's brand
  - Techniques for internal branding and culture cultivation
  - Guidelines for implementing brand standards
  - Tactics for integrating brand messaging with product/service promotion
  - Metrics and strategies for measuring success
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## ABA Bank Marketing School

# Compliance and Marketing

**Instructor: Charles LeFevre, CRCM**

Increased regulatory burden, the rapidly changing landscape of advertising and a shift away from traditional media can make compliance seem overwhelming. This course will provide students with an overview of the laws and regulations that govern a bank's advertising and market planning so they can best mitigate compliance risk at their bank. Students will learn how these laws and regulations relate to loan, deposit and nontraditional products, as well as gain practical knowledge to ensure their bank's advertising is effective and compliant when developing appropriate marketing collateral.

### Course Objectives:

After successfully completing this course, you will be able to:

- Understand the laws and regulations that govern advertising and marketing planning
- Ensure marketing collateral is effective and compliant
- Identify resources available to ensure ongoing mitigation of compliance risk

### Course Content:

- Review of laws and regulations that affect marketing departments
- Discussion of advertising trigger terms and required disclosures
- Assess compliance risks related to third parties, new product and services, and delivery channels
- Explore targeting and disparate impact allegations through case studies and advertising examples
- Understand a reasonable consumer's perspective to avoid the potential to mislead
- Resources shared will include sample forms, websites, guides for UDAAP and managing risk

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**"Charles is excellent.  
He made compliance exciting."**

— Bank Marketing School Graduate



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## ABA Bank Marketing School

# Content Marketing and Management

**Instructor: Shelly Loftin, CFMP**

This course will review how to develop a content strategy that aligns with your business goals, creates engaging and valuable content, and tracks the success of your campaigns. By the end of this course, you will be able to create a content marketing plan that drives results and can grow individual business lines of focus. Learn a proven process to generate endless story ideas as well as effectively document, plan and coordinate your content plan. You'll discover ways to research, remix and repackage your content to make your content work harder for you.


### Course Objectives:

After successfully completing this course, you will be able to:

- Understand and apply the principles of the Content Fuel Framework
- Understand different forms of content and how they factor into content strategy
- Develop a content strategy that aligns with business goals
- Create engaging and valuable content that resonates with your target audience
- Continuously improve content marketing efforts to drive results and grow business
- Evaluate content to repurpose across marketing channels

### Course Content:

- Content idea generation tools
- Content marketing workbook template
- Content management system template
- Name, Image, Likeness (NIL) Discussion

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**“Good tools and takeaway material. It’s an exciting presentation with so much energy.**

**Love it!**

— Bank Marketing School Graduate

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## ABA Bank Marketing School

# Data and Analytics

**Instructor: Hunter Young**

The rise of advanced data analytics and scalable data has transformed how financial institutions approach marketing. In this course, you'll explore diverse data types used to drive both traditional and digital marketing strategies. You'll learn how to extract, analyze and operationalize data to uncover actionable insights, optimize marketing efforts and stay competitive in a rapidly evolving digital landscape.


### Course Objectives:

After successfully completing this course, you will be able to:

- Strategically map and leverage the data available within your institution and vendor systems
- Extract, organize and analyze data to support business growth and informed decision-making
- Forecast customer behavior and optimize marketing spend using predictive analytics
- Assess digital marketing performance using real-time data and advanced metrics

### Course Content:

- Identifying and utilizing customer, market and digital data sources
- Measuring campaign performance using key marketing metrics (CPC, CPM, CPA, LTV)
- Approaches to demographic, psychographic and behavioral segmentation
- Data visualization techniques to effectively communicate insights
- Tools and technologies for data analysis and funnel reporting

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**“Hunter gave many ideas on how to organize the wealth of data that most of us likely have, and showed us how to structure data to get the most out of it.”**

— Bank Marketing School Graduate

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## ABA Bank Marketing School

# Effective Marketing Leadership

**Instructor: Lance Kessler, CFMP**

One of the biggest challenges facing marketers today is having a seat at the executive table. This course is designed to explore the role of marketing and how strategic leadership is essential to that role. Through interactive discussion and hands-on activities, explore how to become a stronger leader in your organization.


### Course Objectives:

After successfully completing this course, you will be able to:

- Gain clarity on marketing's role in your organization
- Identify marketing leadership challenges and how to overcome them
- Describe your leadership identity as it relates to your bank and marketing team
- Understand the key dimensions of effective marketing leadership
- Determine how much time and effort bank marketers should spend on key dimensions of effective marketing leadership
- Determine how to improve marketing's credibility inside the bank

### Course Content:

- The role of marketing in your organization
- The marketing leadership challenges facing bank marketers
- Your leadership identity
- The key dimensions of effective marketing leadership
- How effective marketing leaders should spend their time and effort
- What it takes to be a strong leader
- Improving marketing's internal credibility

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**"Lance Kessler does an excellent job presenting the material and providing valuable and practical information."**

— Bank Marketing School Graduate

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## ABA Bank Marketing School

# Marketing Planning

**Instructor: Lance Kessler, CFMP**

Using the Path to Superior Execution as its framework, this course details how marketing planning does not happen in a vacuum. Learn how to implement a five-step participatory marketing planning process, and how situation analysis, competitive strategy, market segmentation and more play a role. You'll practice applying those elements to a real-life case study in a group exercise that includes presenting your group's marketing plan to the entire class.


### Course Objectives:

After successfully completing this course, you will be able to:

- Identify the Path to Superior Execution and how marketing planning relates to that path
- Describe the role of marketing in financial institutions
- Explain how an organization's competitive strategy relates to the marketing planning process
- Describe the role market segmentation plays in developing customer-centric marketing plans
- Understand the components of an effective marketing plan and know how to build one
- Apply the concepts in this course to a real-life case study and transfer them to the workplace

### Course Content:

- The Path to Superior Execution
- The role of marketing in financial institutions
- Situation analysis
- Competitive strategy and competitive advantage
- Focus on the customer and on revenue generation
- Customer-centric model
- The challenges of human engagement and digital engagement
- Market segmentation: framework and application
- Participatory marketing planning process
- Bank-wide marketing planning
- Local market level marketing planning
- Measurement of marketing plans
- Leadership and accountability in the execution of a marketing plan

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**"This was a beneficial course. It's good to get an overview  
of what drives change in the bank."**

— Bank Marketing School Graduate

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## ABA Bank Marketing School

# Marketing Profitability: Bank Financial Analysis and Asset/Liability Management

**Instructor: Jeff Marsico**

Understanding the components of a balance sheet and how they drive income statements is critical to understanding how marketing affects bank performance. Management reporting, including an Asset-Liability Management Committee (ALCO) and profitability reporting, are used internally to manage risks, measure progress and drive decision-making. In this session, learn to identify profit drivers that result in positive financial performance and how to develop a strategy that focuses on strategic objectives that drive long-term success.

### Course Objectives:

After successfully completing this course, you will be able to:

- Understand the composition of bank balance sheets and income statements
- Calculate balance sheet and income statement ratios most commonly used by internal and external bank constituents
- Identify best-of-class performance
- Understand the impact of risk and profits on a bank's interest rate
- Recognize how risk, pricing and performance affect a bank's liquidity position
- Understand the drivers of line of business, product and customer profitability
- Identify how marketing activities relate to bank profitability and strategy

### Course Content:

- Bank financial statements
- Bank balance sheet and profitability ratios
- Traditional interest rate risk sensitivity gap analysis
- Net interest income and economic value of equity due to interest rate changes
- Bank liquidity calculation and understanding
- Definitions of organizational, product and customer profitability
- Components of profitability: funds transfer pricing, cost allocation, capital assignment
- Strategic planning process
- Using management information in strategy development and measurement

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## ABA Bank Marketing School

# Marketing Return on Investment (ROI)

**Instructor: Joann Marsili, CFMP**

Marketing professionals are required to fill many roles within a financial services organization. They provide strategic direction, research client needs, conduct competitive intelligence, develop new products, manage company communications, support sales activities and more. Given the large demands and challenges of the job, many find it difficult to effectively evaluate and prioritize marketing activities. In this session, learn to show the financial ROI of your bank marketing endeavors.

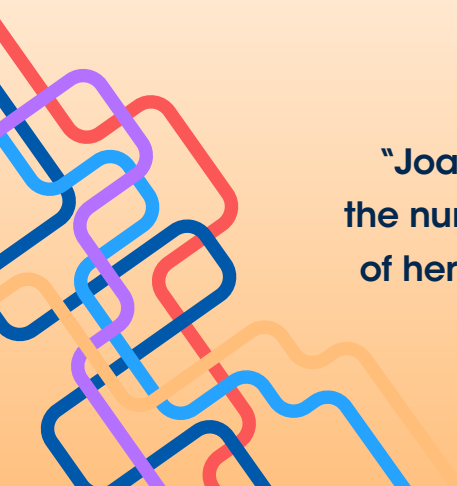
### Course Objectives:

After successfully completing this course, you will be able to:

- Calculate ROI for marketing campaigns
- Evaluate the economic value of marketing programs
- Demonstrate ROI's impact on budget
- Create unique value propositions to help drive increased sales, lower the cost of acquisition, differentiate your bank and help you grow faster than the competition

### Course Content

- The importance of ROI to you and to your institution
- Building the case for a marketing budget
- The economic value of marketing programs
- How to measure ROI

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**“Joann was an excellent presenter and helps make the numbers make sense. I will definitely be using some of her tactics when presenting to my executive team.”**

— Bank Marketing School Graduate

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## ABA Bank Marketing School

# Marketing Risk Management

**Instructor: Charles LeFevre, CRCM**

Reputation risk affects an institution's ability to establish new relationships, products or services, and continue serving existing relationships. This risk can expose an organization to litigation and financial loss as well as damage the brand. Aside from reputational damage, operational risk can lead to increased costs or decreased revenue. In this course, learn to manage operational risk so you can ensure that your marketing programs are executed accurately, on time, on budget and on strategy.


### Course Objectives:

After successfully completing this course, you will be able to:

- Enhance and lead the marketing risk management discipline at your organization
- Use tools and techniques associated with documenting and assessing risk, managing risk events and storing important documentation
- Understand best practices for marketing compliance and audit preparedness

### Course Content:

- What is marketing risk, and how to identify and assess those risks
- When to accept, mitigate or transfer risk
- Explore efficient and effective controls that don't block creativity and impede customer experience
- Overview of processes that should be documented by every marketing department and how to do so

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**“Charles made what could have been a boring subject into something that engaged the audience and helped us learn by producing real-world comparisons to bank risk.”**

— Bank Marketing School Graduate

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## ABA Bank Marketing School

# PR/Communications

**Instructor: Theresa Wendhausen, CFMP**

In this course, examine mass and digital media from the perspective of both receivers and senders of marketing communications. Learn to consider both the consumer and business markets in a rapidly changing environment. Consider how your organization handles PR, including requests for donations, media list compilation, media contact strategies and the creation of an annual communications plan.


### Course Objectives:

After successfully completing this course, you will be able to:

- Identify and use available communication channels
- Develop a measurable communication and public relations plan
- Recognize the elements to consider when creating a strategic program for community giving
- Use media contacts and annual marketing calendars
- Manage corporate citizenship activities to increase visibility

### Course Content:

- Identification of communications channels that currently exist
- B2B and B2C use of channels
- Discussion on the strengths and weaknesses of different channels
- Benefits of optimizing channel use
- Definition of public relations management
- Strategic choices to consider when creating a corporate giving program
- Best practices for crisis communication

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**“Great course. Very helpful and the real examples were great.  
I will definitely use these insights to further my PR tactics.”**

— Bank Marketing School Graduate



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## ABA Bank Marketing School

# Sales and Marketing Alignment

**Instructor: Shelley Regin, CFMP**

When sales and marketing teams unite around shared goals, they become a formidable engine for driving revenue growth. This course, tailored to professionals in sales and marketing roles, will equip you with the tools and strategies to effectively align sales and marketing efforts, enhancing your ability to create impactful, data-driven campaigns that resonate with the C-suite.

### Course Objectives:

After successfully completing this course, you will be able to:

- Empower sales teams to transform overarching strategies into actionable opportunities.
- Develop effective, revenue-generating strategies that align with organizational goals.
- Establish a collaborative framework that maximizes the synergy between sales and marketing teams for optimal outcomes.
- Analyze how ROI influences campaign management and decision-making.
- Sales and marketing metric-driven reporting

### Course Content:

- Integrating sales and marketing practices across the organization
- Hands-on exercises for practical application
- Group discussions focused on collaborating with sales teams
- Actionable insights to implement within your bank
- Leveraging LinkedIn for sales teams

**“This course gave a lot of practical takeaways and examples. Shelley was a great and knowledgeable instructor.”**

— Bank Marketing School Graduate



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## Meet the Faculty

### **Amber Farley**

EVP Brand Development  
**Financial Marketing Solutions**  
Franklin, TN

### **David Femi**

Senior Vice President, Business &  
Professional Banking Regional Manager  
**M&T Bank**  
Bridgeport, CT

### **John Hanley, CFMP**

EVP, Chief Experience Officer  
**Idaho First Bank**  
Boise, Idaho

### **Lance Kessler, CFMP**

President,  
**Lance Kessler & Associates —  
Marketing Consulting and Training**  
Mechanicsburg, PA

### **Charles LeFevre, CRCM**

Principal & Founder  
**Stanford Hill**  
New Orleans, LA

### **Shelly Loftin**

Senior Director of Marketing Strategy &  
Sales Enablement  
**Arvest Bank**  
Benton, AR

### **Jeff Marsico**

President  
**The Kafafian Group Inc.**  
Bethlehem, PA

### **Joann Marsili, CFMP**

EVP, Chief Marketing &  
Digital Experience Officer  
**Fidelity Bank**  
Leominster, MA

### **Shelley Regan, CFMP**

Chief Marketing and  
Community Relations Officer  
**Country Bank**  
Ware, MA

### **Theresa Wendhausen, CFMP**

Vice President, Branding and  
Communications Manager  
**First National Bank and Trust Company**  
Beloit, WI

### **Hunter Young**

Founder & President  
**HIFI Agency**  
Raleigh, NC





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