


Presentation materials and video replay will be provided within one week.

Have questions? Use the questions panel  – we'll field them as we go and during the Q&A recap at the end of the call.



Five Reasons You Should Consider a NEW Print On Demand Process

Today's Agenda

- Challenges for Financial Institution Marketers
- Overcoming the Challenges
- Our Solution
- Q&A

Today's Presenters



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Challenges of an Financial Institution Marketer



Challenges of an Financial Institution Marketer

Typical process to mail post cards

- Many steps to follow
- 10 to 21 business days
 - Design
 - Proofs
 - Approvals
 - Print
 - Mail
- **Two to five hours per piece**

*Complex
Time-consuming*

LOAN OFFICER Step 1

- Loan officer wants to co-brand with their **Realtor** partner
- Emails request to Marketing

MARKETING Step 2

- Schedule time to develop template
- Emails PDF to **loan officer** for approval

LOAN OFFICER Step 3

- Emails **Realtor** PDF for approval
- Emails changes or approval back to **Marketing**
- Fills out Realtor Co-branding approval form to **Realtor**

MARKETING Step 4

- Makes changes to postcard
- Emails **Loan Officer** updated PDF of postcard

LOAN OFFICER Step 4

- Emails **Realtor** updated PDF for approval
- Sends final approval to **Marketing**

REALTOR Step 5

- Signs, scans and emails/mails **Realtor** co-branding agreement

MARKETING Step 6

- Emails request for mail list to be scrubbed against company Do Not Contact list
- Emails vendor scrubbed list with PDF to complete mailing - or - sends PDF of postcard to print vendor

PRINT VENDOR Step 7

- Prints and ships postcards to **loan officer**

LOAN OFFICER Step 8

- Prints labels and applies to postcard along with stamp - 1-3 hours
- Takes postcards to post office for mailing

A Better Way

Improved process to mail post cards

- Fewer steps to follow
- Fewer business days
 - Design
 - Proofs
 - Approvals
 - Print
 - Mail
- **20 to 30 minutes per piece**

✓ *Efficient*
✓ *Self-service*
✓ *Compliant*

LOAN OFFICER Step 1

- Logs in to storefront
- Selects postcard from library
- Postcard is auto filled with **LOAN OFFICER** contact info and photo options
- **LOAN OFFICER** selects Realtor logo and headshot from library or uploads a new one
- **LOAN OFFICER** uploads home info, photos, etc.
- **LOAN OFFICER** uploads mailing list
- **LOAN OFFICER** submits order and sends approval request to the Realtor

REALTOR Step 2

- Receives email requesting approval of postcard and accepts company marketing agreement within email

MARKETING Step 3

- Marketing receives order and approves, denies, or edits directly within storefront

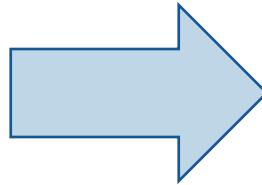
PRINT VENDOR Step 4

- Receives order, scrubs list against Do Not Contact which is automatically added to each postcard along with postage

A Better Way

FROM:

- Up to 50 hours
- Manual system
- Many steps
- Frustrating



TO:

- Less than three hours
- Reduced approval time
- Reduced marketing involvement
- Easy

Introducing BRAD from Harland Clarke

BRAD

BRAND RESOURCE & DISTRIBUTION

- BRAD = **B**rand **R**esource **A**nd **D**istribution
- Harland Clarke's **new** customized online self-service portal.

BRAD enables you and your branches to print all your branded marketing materials – on demand – quickly and easily.

Demo: BRAD from Harland Clarke




HOME | STORE | MY PROFILE | LOGIN

WELCOME
to a whole new way to order
and distribute marketing content

BRAD
BRAND RESOURCE & DISTRIBUTION

Start a New Order ▶ Re-Order ▶

Powered By  HARLAND CLARKE®

[Contact Customer Service](#)

BRAD Wears Many Helpful Hats

- BRAD works for multiple business segments
 - Advertising and ad placement
 - Teller training
 - Loan marketing
- BRAD manages change
 - Branch openings
 - Quarterly marketing refresh
 - Multiple brands (important to holding company initiatives)
 - Brand acquisition
 - Product launches
 - Event planning
- BRAD unifies ordering processes
 - Business card and stationery
 - Forms and supplies
 - Brochures, flyers, disclosures

Five reasons BRAD improves your print on demand process ...



BRAD from Harland Clarke



Q&A Wrap Up

Type your question in the questions panel 

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Thank You

