



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

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

A Simple Way to Manage Your Branded Marketing Materials During an M&A

Today's Presenters



Debra Corwin

Vice President, Print Solutions Product Marketing, Harland Clarke



Steve Hesse

Director, Web Services, Wright Business Graphics

Today's Agenda

M&A Industry Trends

How M&As Challenge Your Marketing Department

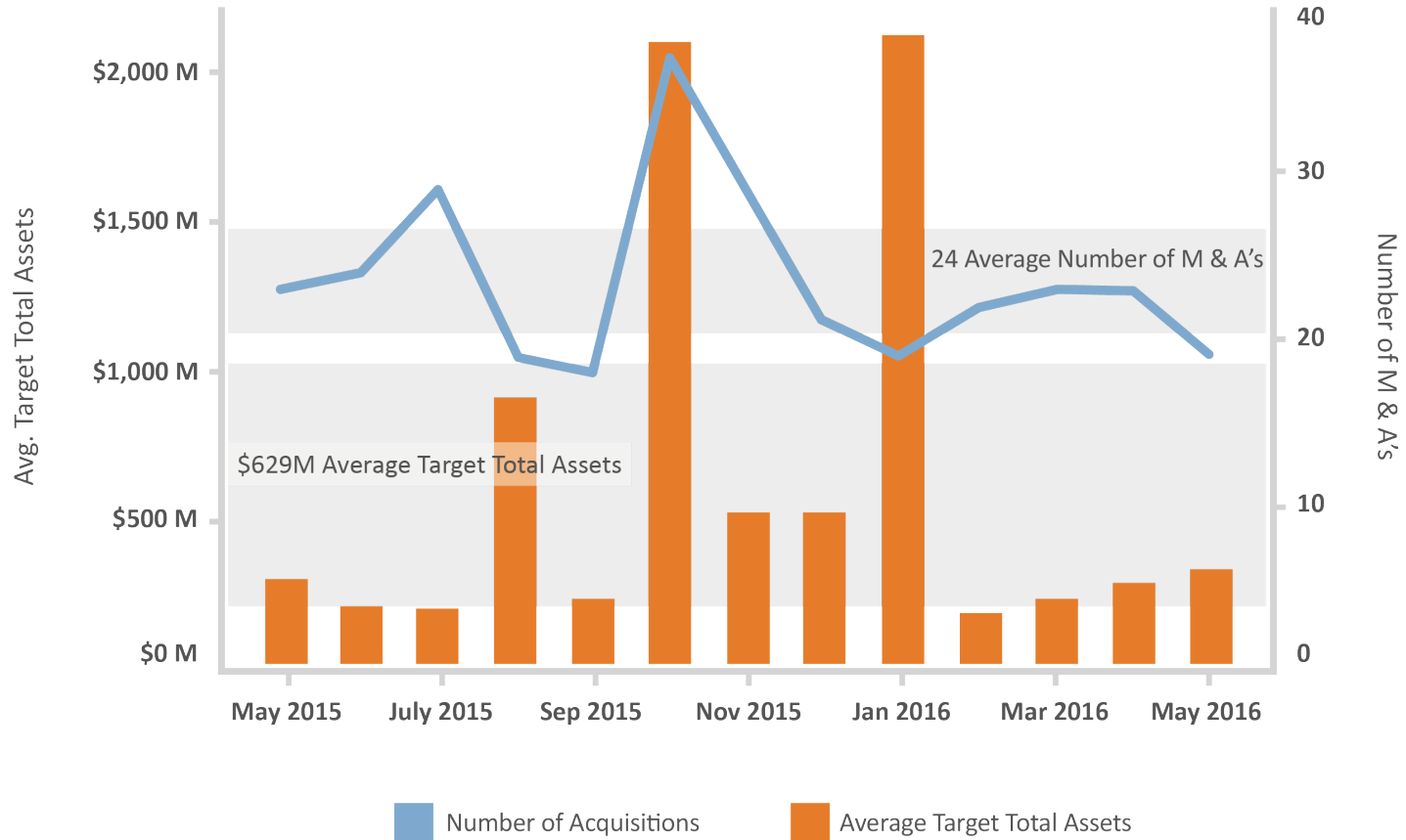
A Simple Way to Manage Your Branded Marketing Materials During an M&A

Q&A

M&A Industry Trends > > >

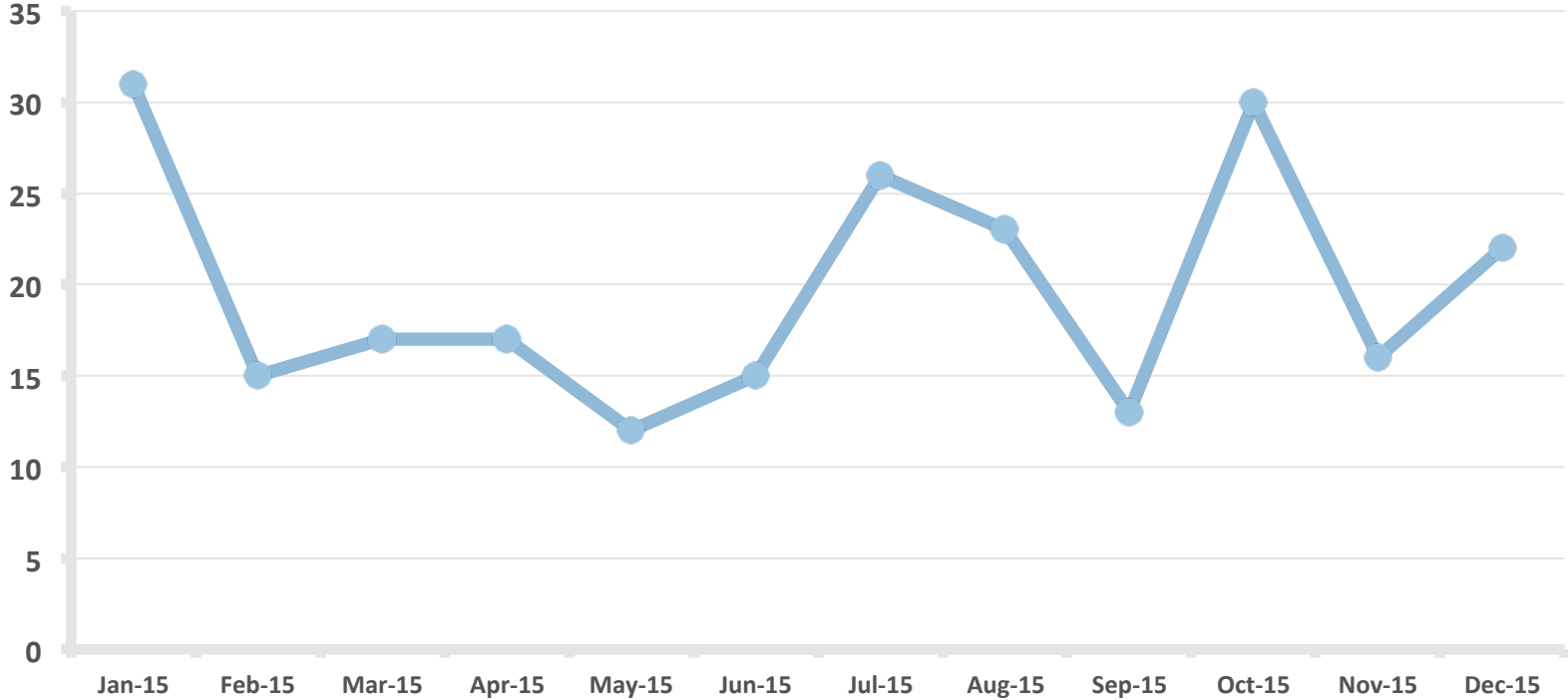
Bank M&As - Recent Activity

Bank Mergers & Acquisitions - Last 13 Months



Credit Union Approved Mergers

Credit Union Mergers

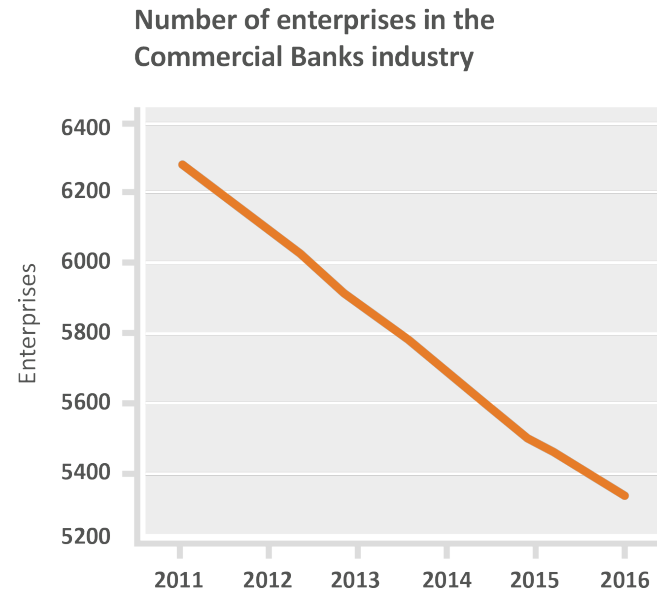
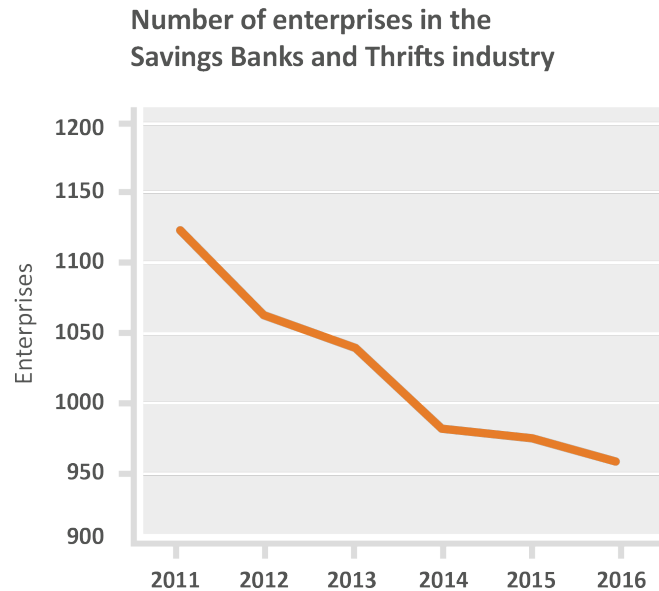


Data compiled Jun 16, 2016.
Includes mergers approved from Jan. 1, 2015 through Dec. 31, 2015.
Source: National Credit Union Administration



Banking Sector Primed for M&A Activity in 2016

Total number of enterprises is expected to fall 0.6% over 2016



Factors:

- Regulatory pressures and low-growth environments
- Rising regulatory compliance costs
- Leverage the benefit of technology transfers and scale

Post-Merger Integration Challenge

60% of bank leaders reveal that post-merger integration was the most difficult aspect of their most recent deal ...

33% higher than previous year

Challenges for Your Marketing Department > > >

New Branches Require New Marketing Materials

Providing personalized supplies to employees

- Business cards
- Stationery

Stocking the branches with supplies

- New account kits
- Posters
- Marketing materials
- Promotional items

Community announcements

- Print ads

Reaching out to new neighbors

- “Save the Date” mailings on upcoming seminars
- Awareness mailing to small business and targeted account holders

Providing Personalized Supplies to Employees

Typical process to order cards

- Many steps to follow
- 2 to 3 business days
 - Personalize
 - Proofs
 - Approvals
 - Print
 - Ship
- **1 hour per card**

MARKETING Step 1

- Gather personal information from new employees
- Emails PDF to **New Employees** for approvals

NEW EMPLOYEES Step 2

- Review email PDF from **Marketing**
- Request changes if needed

MARKETING Step 3

- Makes changes if necessary
- Emails **New Employees** updated PDF

NEW EMPLOYEES Step 4

- Review updated PDF from **Marketing**
- Sends final approval to **Marketing**

MARKETING Step 5

- Gathers all new employee orders
- Submits group order to **Print Vendor**

PRINT VENDOR Step 6

- Prints and ships postcards to **New Employees**

*Coordinating group orders
Time-consuming*

Stocking Branches With Marketing Materials

Typical process to stock the new branch

- Multiple vendors
 - Print
 - Folders
 - Signs
 - Promotional
- Multiple shipments
- **30 minutes per vendor**

Multiple orders
Multiple deliveries
Time-consuming

MARKETING Step 1

- Determine which supplies are needed
- Determine quantity of each to send

MARKETING Step 2

- Submit orders to Print vendor
- Submit orders to Folder vendor
- Submit orders to Sign vendor
- Submit orders to Promotional Item vendor
- Submit orders to other vendor

MARKETING Step 3

Notify **New Branch** of orders and ship dates
Monitor vendor tracking information

NEW BRANCH MANAGER Step 4

- Notify **Marketing** via email when:
 - Print material arrive
 - Folders arrive
 - Signs arrive
 - Promotional items arrive
 - Other materials arrive
- Confirm condition and quantity of each item

Sending Community Announcements

Typical process to prepare ads

- New ad copy
 - Weekly
 - Monthly
- Multiple sizes
 - Publication specific
- Time-sensitive
 - Press dates not flexible
- **1 to 2 hours per piece**

*Time-consuming
Never-ending*

BRANCH MANAGER Step 1 • Identifies local publications to advertise
• Emails request to Marketing

MARKETING Step 2 • Schedule time to develop ad
• Emails PDF to **branch manager** for approval

BRANCH MANAGER Step 3 • Confirms size ad needs to be for Publication #1
• Emails ad size to **Marketing**

MARKETING Step 4 • Makes changes to ad to fit size requirements
• Emails **New Branch Employee** updated ad

BRANCH MANAGER Step 4 • Emails **Marketing** request to resize ad for Publication #2

MARKETING Step 5 • Emails re-sized ad to **Branch Manager**

BRANCH MANAGER Step 6 • Emails **Marketing** request to modify the dates of the ad for Publication #1

MARKETING Step 7 • Emails modified ad to **Branch Manager**

Reaching Out to New Neighbors

Typical process to mail post cards

- Many steps to follow
- 10 to 21 business days
 - Design
 - Proofs
 - Approvals
 - Print
 - Mail
- **2 to 5 hours per piece**

*Complex
Time-consuming*

BRANCH MANAGER Step 1

- Branch Manager wants to send invitation to visit the new branch
- Emails request to Marketing

MARKETING Step 2

- Schedule time to develop template
- Emails PDF to **Branch Manager** for approval

BRANCH MANAGER Step 3

- Emails changes or approval back to **Marketing**

MARKETING Step 4

- Makes changes to postcard
- Emails **Branch manager** updated PDF of postcard

BRANCH MANAGER Step 4

- Sends final approval to **Marketing**
- Requests mailing list

MARKETING Step 5

- 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 6

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

BRANCH MANAGER Step 7

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

A Simple Way to Manage Your Marketing Materials > > >

Introducing BRAD from Harland Clarke

BRAD

BRAND RESOURCE & DISTRIBUTION

Harland Clarke's 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](#)

5 Reasons BRAD Improves Your Print on Demand Process

1

BRAD Is Personal

2

BRAD Is Fast and Cost-Efficient

3

BRAD Is Compliant

4

BRAD Is Easy to Manage

5

BRAD Gives You Control

Marketing with BRAD

- **BRAD** has self-service **personalized materials** available in days — not weeks!
- **BRAD** allow us to **consolidate** multiple ordering processes into ONE
- **BRAD** has provided the **control** that marketing needs.
- **BRAD** follows our **brand standards**.
- **BRAD** offers a **self-service** direct mail tool for the Mortgage Department and local Realtors to develop compliant direct mail campaigns to earn new business.

Q&A

Type your question in the chat panel 

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Thank You

