




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.

A Better Way to Manage Ordering and Distribution of Marketing Materials

December 14, 2016

Today's Agenda

- Challenges for Financial Institution Marketers
- A Better Way to Order and Distribute Marketing Materials
- How a Two-Person Marketing Team Improved Efficiency and Productivity
- Solution Demo
- Q&A

Today's Presenters



Debra Corwin
Vice President
Print Solutions Product Marketing
Harland Clarke



Steve Hesse
Director
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Wright Business Graphics

Challenges for Financial Institution Marketers



Challenges for Financial Institution Marketers

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

Increase Efficiency and Productivity

Improved process to mail postcards

- 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

Increase Efficiency and Productivity

FROM:

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



TO:

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

BRAD [Brand Resource And Distribution]

Our Customized Online Self-Service Portal > > >

BRAD Helps Increase Efficiency and Productivity

BRAD

BRAND RESOURCE & DISTRIBUTION

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

BRAD's Benefits



BRAD's Versatility

- **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
 - Print and mail

BRAD in Action

"[BRAD] saves us several hours a week."

*"The Harland Clarke team made
it an easy experience."*

*"I was very pleased with how quickly
our portal was implemented –
and surprised by how easily our branches
became comfortable using the portal."*

Linda Salyer
Marketing Assistant
First Bank & Trust Company



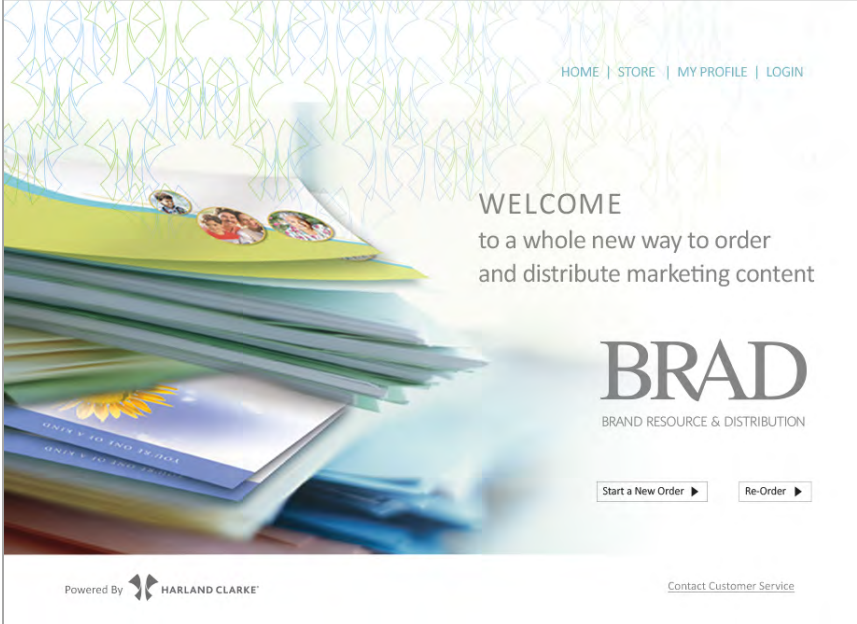
Challenges for First Bank & Trust Company

- Two-person marketing department
- 21 branches
- 300+ employees
- Support the community schools
 - Advertising in sports programs
 - Sponsor Yearbooks
- Stocking branches
- Maintaining inventory
- Updating art files

How BRAD Helped

- **Fast implementation**
- **Easy integration**
- **Easy to use**
- **High-quality production**
- **Self-service tool**
- **Fast ordering and delivery**
- **Competitive price**
- **Eliminated inventory**
- **Simplified marketing material management**

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](#)

Q&A Wrap Up

Type your question in the questions panel 

Debra Corwin

Vice President, Print Solutions Product Marketing,
Harland Clarke

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Director, Web Services, Wright Business Graphics

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Thank You

