ICBA

Preferred

Service Provider®

ICBA PREFERRED SERVICE PROVIDER®

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ICBA Preferred Service Provider (PSP) Marketing

This document is intended to consolidate all marketing tactics, processes and procedures available to marketing and sales specialists when working with the ICBA to promote a preferred service.

What is ICBA?

The Independent Community Bankers of America® creates and promotes an environment where community banks flourish. With more than 50,000 locations nationwide, community banks constitute 99 percent of all banks, employ nearly 750,000 Americans and are the only physical banking presence in one in three U.S. counties.

Holding more than $5 trillion in assets, more than $4 trillion in deposits, and more than $3.4 trillion in loans to consumers, small businesses and the agricultural community, community banks channel local deposits into the Main Streets and neighborhoods they serve, spurring job creation, fostering innovation and fueling their customers' dreams in communities throughout America.

ICBA is dedicated exclusively to representing the interests of the community banking industry and its membership through effective advocacy, best-in-class education, and high-quality products and services.

Who are ICBA's member banks?

Community banks are an integral part of Main Street; they reinvest local dollars back into the community and help create local jobs. Their relationship banking philosophy is ingrained in the way they conduct business, one loan—one customer—at a time. Local reinvestment helps small businesses grow and helps families finance major purchases and build financial security.

Community banks also are nimble in using new technology platforms, supporting emerging methods of payments and advocating tougher security standards to protect small-business owners and customers from hackers and other criminals.

Ultimately, community banks are defined by business philosophy rather than size. Key differentiators include:

- **Local focus**
- **Relationship banking**
- **Leading small business lenders**

Did you know? More than 80% of ICBA's Member banks use at least one PSP service!

What is an ICBA PSP?

The acronym stands for ICBA Preferred Service Provider. PSPs are community banking partners that are selected by the ICBA Bank Services Committee to provide unique solutions and education to ICBA member banks. For the full list of PSPs, visit https://www.icba.org/solutions/preferred-service-providers.

The success of your Preferred Service Provider program depends on:

1. Resources you commit to marketing to ICBA members.
2. The design of a value-added program that addresses a specific challenge in the community bank market.
3. Your level of engagement with ICBA to share your story and message.

Who are your key contacts at ICBA?

Lauren White, Vendor Relations Coordinator
ICBA (DC Office)
Lauren.White@cba.org
P. (202) 821-4309
Marketing opportunities, Member Lists, Logo usage, & Relationship Management

Laura Norrell, Director, Vendor Relations
ICBA (DC Office)
Laura.Norrell@icba.org
P: (202) 821-4475
Corporate Membership, Relationship Management

Adam Mahone, ICBA VP, Vendor Relations
ICBA (DC Office)
Adam.Mahone@icba.org
P: (202) 821-4363
Relationship Management, Contract Renewals, Amendments, & Reporting

Matt Kusilek, Publisher/National Sales & Marketing
ICBA Independent Banker® Magazine
Matt@icbabanks.org
P: (612) 730-5940
ICBA Advertising, Webinars, Events, Sponsorships

Julie Kulzer, Director, Conferences & Exhibits
ICBA (Sauk Centre office)
Julie.Kulzer@icba.org
P: (320) 352-7345
ICBA LIVE! National Convention

Leveraging the PSP Relationship

One of the top goals for PSPs is to educate member banks about their solutions and the surrounding business environment (regulations, industry events, etc.). There are multiple resources to use to promote solutions, and deliverables may vary for new solutions, renewals, regulatory changes, etc.

Highly effective marketing platforms include:

- Educational webinars
- Press releases
- Articles written by subject matter experts
- ICBA NewsWatch articles
- ICBA Member Access video spotlight
- ICBA LIVE Annual Convention
- Speaking engagements

The ICBA Logo

As a PSP, you have the exclusive rights to use the ICBA name and logo in your marketing materials! By consistently using the logo in conjunction with ICBA's promotional opportunities, you can "get your foot in the door" at many community banks to compete for their business. To gain the most from this benefit, it is vital that the logo be used on all community-bank facing marketing pieces. Examples may include business cards, email signatures, brochures, websites, etc. The logo is available to PSPs in a variety of formats including .eps, .jpeg, and available in full color or white (for use on a dark background).

ICBA Blue:

CMYK	**RBG**
C = 100	R = 7
M = 86	G = 35
Y = 0	B = 101
K = 45	
HEX: 072365	**PMS:** 280 C

Marketing Internally

Community banks are not the only ones who benefit from a PSP program! Your internal sales team will require ongoing education about the program and benefits to banks to help them win business. Each member of your sales team should be able to summarize your company's preferred services and talk about the value-added benefits for ICBA members. You will receive an updated list of ICBA member banks on a quarterly basis to help you identify banks that qualify for the value add, and Laura Norrell and Lauren White are able to assist if you have questions about the status of an individual institution.

Sample Script for Member Banks:

- I see that your bank is a member of ICBA! Did you know that [Company] is a Preferred Service Provider? As a result, your bank is eligible to receive (insert value add).
- I noticed that your bank is a member of ICBA. [Company] is an ICBA Preferred Service Provider, and this special relationship entitles you to (insert value add) on our preferred services, including X and Y.

Sample Script for Non-Member Banks:

- I was looking at your bank and noticed that you aren't an ICBA member. ICBA is a national organization promoting community banking through lobbying efforts, education, and services. If you aren't familiar with ICBA's work, I'd be happy to facilitate a conversation with the Regional Officer for this area. [Company] is a Preferred Service Provider, and you'll be entitled (insert value add) on our preferred services if you join!

Sales personnel should also feel comfortable reaching out to ICBA for assistance with individual community banks! ICBA will be happy to advise if the bank is a member (and eligible for a discount!), leadership banker, or provide additional information that could prove useful in your conversations. ICBA will also make recommendations to banks based on our due diligence process.

Meanwhile, all your employees may take advantage of additional benefits through ICBA, including:

- Subscriptions to e-newsletters NewsWatch Today and Member Access
- IB Magazine subscriptions (digital version)
- Discounted registration at ICBA Community Banking LIVE
- Discounted educational opportunities from Community Banking University

Sharing your Sales Funnel

As you utilize a mix of marketing techniques to build your sales funnel, let the Member Relations team know about non-member community banks that express interest in your services. The Member Relationship Officers (MROs) may be able to help you win this new customer by jointly sharing the benefits of both ICBA membership and the special discounts offered only to ICBA members.

If a non-member community bank expresses interest in joining the association, reach out to the MRO of the appropriate region (see ICBA Regional Offices map), copying Laura Norrell at laura.norrell@icba.org and Lauren White at lauren.white@icba.org. Provide a summary of your conversations with the banker including their name and a summary of your conversations. The MRO will advise next steps based on his or her availability. Potential next steps may include an email or telephone introduction with further action developing organically based on the banker's needs.

Promoting Preferred Solutions to Member Banks

Conducting a Webinar Campaign

Webinars among the most successful methods of building your company's reputation, sharing your message, building a contact list, and generating interest from bankers. ICBA recommends hosting educational webinars (85% educational content, very little sales-oriented content) to show your expertise and dedication to the industry. Bankers appreciate information from subject-matter experts and will think of your company when they realize a need (which can be clearly defined within the webinar).

1. Work with your solution subject matter expert to choose an educational topic.
2. Review the ICBA events calendar to identify a good date and time. Consider avoiding weeks with other webinars on the same topic, and times when there may be conflicting events.
3. At least 2-3 weeks before the webinar, provide Lauren White with information to promote the webinar:
    a. Title
    b. Date/Time
    c. A 2-3 sentence description of the educational content
    d. Link to register
4. As the schedule permits, Lauren will share the webinar through ICBA's electronic newsletters, website, the ICBA events calendar and other venues as available.

Concurrent Marketing

Hosting a webinar campaign takes considerable resources, so re-purpose that information for additional visibility! The same information can be used in:

- White papers
- Case studies
- Infographics
- Blog posts
- Social media

ICBA will promote these items through appropriate venues, where they may reach a different audience. These items will also be hosted on your Solutions Directory listing! Send a link to the item to Laura Norrell to begin promotion (remember – links are required, no attachments).

Direct Mailings to ICBA Members

ICBA may reach out to members on your behalf via direct mail. Letters may be sent on ICBA letterhead and signed by an ICBA executive to introduce your preferred service. This is an excellent way to introduce additions to your services, limited time offers, free reports, and other "hooks." Pricing is dependent upon the number of recipients, ICBA can provide a customized quote at any time.

1. Reach out to Lauren to discuss scheduling, ideally 4-6 weeks before you're proposed mailing date.
2. 3-4 weeks in advance of the mailing date, provide Lauren with draft copy and your target audience. ICBA will send the mailing to any subset of membership, allowing you to define your target audience by asset size, key roles, geographic segments, etc.
3. Lauren will format the letter on ICBA's letterhead, make edits consistent with ICBA's tone and language, and initiate ICBA's approvals process. The final letter will be submitted for your review. Meanwhile, ICBA will provide you with a recipient list based on your target audience. If desired, you may remove current customers, banks already in your sales pipeline, etc.
4. With your final approval, the letter will mail as scheduled to your key targets.

Fax Blasts

Faxing to ICBA members is an inexpensive alternative to direct mail with a lower price point and shorter approvals process.

- A fax to all ICBA members is approximately $400, and the price may deviate based on customized target lists.
- Single page only
- Use large font sizes and limit graphics to simple logos
- One-week turnaround time

Celebrating Milestones

Your news is ICBA's news! ICBA will help to share your important milestones with ICBA members. Examples may include anniversaries, community banks signed on, a significant savings from a member discount, or something more specific to your particular service. ICBA may share milestones via:

- Press releases
- Direct mail
- Electronic newsletters
- Solutions directory listing
- Social media

Advertising

The most successful PSPs utilize a mix of promotional opportunities that include advertising and sponsorships! Details on advertising opportunities are available online at the newly redesigned website for service providers available at https://www.icba.org/corporate-members.

Opportunities change frequently, highlights include:

- Independent Banker Magazine (ICBA's monthly publication)
- Preferred Perspectives Showcase: Highlighted in the August issue of Independent Banker Magazine, this annual section highlights the unique value of PSPs.
- Pre-and at-show advertising for the National Convention
- ICBA National Convention: Annual event in March, all PSPs are assigned booths on Main Street.
    - Workshop Speaking Proposals for the annual tradeshow are sent out each fall. A small number of these educational workshops are available to PSPs, and selections are made based on timeliness, educational content, and expressed interest from bankers. Please note established deadlines, late submissions do not receive full consideration.
    - Reserved speaking slots for PSPs are limited, consider including a workshop in your sponsorship.

For more information and to learn about additional advertising opportunities, reach out to Matt Kusilek at matt@icbabanks.org.

Conversations on Social Media

Join the conversation on social media and share your services, solution and story in front of thousands of ICBA followers on Twitter, LinkedIn, Facebook and Instagram. Drive engagement with the following best practices:

- Take advantage of industry hashtags (#GoLocal, #BankLocally).
- Take the time to engage with community bankers on social media. Share their news, community involvement initiatives and congratulate them on their achievements.
- Share articles and news where your clients and prospects are featured.
- Share valuable resources, whitepapers, articles and information 80% of the time. The extra 20% of your posts can be promotional.
- Choose your social media channels wisely. Spend more of your time and resources populating valuable content and engaging rather than spreading yourself too thin on too many platforms.

- Take advantage of opportunities on each channel to engage. Use groups on LinkedIn. Humanize your offerings with stories on Instagram. Join industry Twitter chats.
- Follow and tag @ICBA, as well as community banks to reach a wider audience.

Announcing and Promoting New Solutions

The most successful PSPs grow their programs by regularly adding new products and solutions to the agreement. You will then be able to apply all the benefits of the PSP program to the new service, including use of the ICBA name and logo in marketing efforts. To begin the process of adding a new service to the PSP agreement, reach out to the Vendor Relations team (Adam Mahone, Laura Norrell, and Lauren White). The process to add a new service includes:

- An overview of the service for the ICBA Vendor Relations team
- Submission of program proposal
- A thorough due diligence process
- A presentation to the Bank Services Committee
    - The Bank Services Committee will offer their recommendation after evaluating the value the service will bring to community banks
- Amending the existing PSP contract to include the new solution

Steps to Announce a NEW PSP Solution

1. ICBA will announce your new solution via a press release, which may be issued to coincide with a corresponding release from your company. The press release will include quotes from ICBA and your leadership, as well as a quote from a member bank if applicable. Additionally, it will provide a brief description of the value that the service brings to community banks. ICBA will draft the press release and submit it for your edits and approval.
2. Issuing the release will trigger additional marketing outreach through ICBA's electronic newsletters, and an announcement in Independent Banker magazine.
3. While the press release is under development, we will also work together on a Chairman Letter. This letter is mailed on ICBA letterhead under the signature of the Bank Services Committee chairman to offer a personal introduction to banking peers. Again, you will have the opportunity to review and edit the letter. Ideally, the letter will contain a description of the service and also a call to action (the most common being an invitation to an introductory webinar for ICBA member banks).
4. PSPs receive enhanced listings in the ICBA Solutions Directory! We will review your existing listing together and update it to include the new services. Additionally, we will ensure that the press release, introductory webinar, and other materials are attached to the listing.
5. Most importantly, keep up the outreach efforts after the program has been announced. We recommend that you host one or two introductory webinars to show the service to community banks, and continue a steady drip of promotional materials including case studies, social media outreach, blog posts, etc.
6. Review the headway that the solution has made six months, then a year after the announcement. See "Celebrate Milestones" above to generate a positive story about the new solution.

Promotional Timing

When developing content to share with community bankers through ICBA, please keep this timeline in mind. It shows the time between initial submission of your content and its publication. Add your internal development time to the weeks below to ensure that all parties have appropriate time to meet their goals. Please submit your content to Lauren White.

Example Timetable:	
Newsletter promotions (NewsWatch, Member Access)	2-4 weeks
Fax blast	1 week
Direct mail	2-4 weeks
Press Release	4 weeks

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Reporting

As stated in your PSP contract, ICBA requires that you provide a list of your member bank customers on a regular basis. We use this report to justify royalty payments as necessary to ensure ICBA's tax-free non-profit status, show the value of the program to member banks, and judge the growth and value of the program to you and other PSPS. The report must be in Excel or .csv format and include the following fields:

- Bank name
- Address
- Product purchased
- Contract Start and End Date
- Member discount (in dollars)
- Remittance to ICBA (in dollars)
- FDIC certificate number

If you are unable to provide the FDIC, please include instead the RFSID, website URL, or email address to help us uniquely identify the bank.

For a sample report, please contact Lauren White.