

# SMBanking/**FORWARD**

## DIGITAL SESSION GUIDE

DAY TWO | OCTOBER 6 | 9 a.m. – Noon CST

#SMBForward

# AGENDA

Join the event at [hopin.com/events/smbanking-forward](https://hopin.com/events/smbanking-forward)

## DAY TWO

Wednesday, October 6th

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### ACTIVATE

9 – 10:30 a.m. CST

Attracting new relationships is only part of the battle. Once SMBs enroll, how do you activate the relationship to ensure long-term engagement and primacy.



### GROW

10:30 a.m. – Noon CST

Small business relationships have been historically underserved. What strategies can your FI put into place to ensure mutually beneficial SMB partnerships.

**SESSION 1**

Wednesday October 6, 9 – 9:30 a.m. CST



**Corey  
LeBlanc**

Co-Founder, COO/CTO  
Locality Bank io

Notes

**Key Takeaways**

1. Mindset difference between working at a traditional bank versus a bank startup?
2. The bank's decision to found a small business focused bank?
3. What has it been like to work with regulators in starting your new bank?

**SESSION 2**

Wednesday October 6, 9:30 - 10 a.m. CST



**Norm  
DeLuca**

Managing Director,  
Banking Solutions

Bottomline  
Technologies

**Key Takeaways**

1. Highlight capabilities most important to the end customer (deliver them value first and foremost)
2. Use analytics to determine who needs proactive outreach and support
3. Find the "thing" that keeps the customer coming back and make sure it is the focus of the product experience

Notes

**SESSION 3**

Wednesday October 6, 10 – 10:30 a.m. CST



**Melissa  
Eggleston**

Chief Deposit  
Officer, EVP

Nbkc

**Key Takeaways**

1. Enabling clients to onboard online doesn't mean you can't still offer personal service.
2. Marketing websites should feature customer outcomes, not focused on transactions.
3. Banks don't feature customer feedback/testimonials enough.

Notes

**SESSION 1**

Wednesday October 6, 10:30 - 11 a.m. CST

**Omar  
Shaikh**

Head of Credit and  
Decision Science  
StreetShares

**Key Takeaways**

1. There are a number of challenges impeding Growth. The bigger the challenge, the bigger the opportunity to unlock Growth.
2. Avenues of Growth include attracting new customers, cross-sales of existing customers, delivering new products and increasing efficiency.
3. Data, analytics and automation can play a key role in supporting Growth and reducing costs.

**Notes**

**SESSION 2**

Wednesday October 6, 11 – 11:30 a.m. CST

**Dean  
Jenkins**VP Product  
Marketing

Q2

**Key Takeaways**

1. Digital user expectations have shifted. It's no longer good enough to have a new user interface. You must be able to solve problems for the end customer.
2. Increasingly, small businesses are turning to fintech providers to solve their problems. This is a challenge for banks.
3. Small businesses are spending a lot on third party tools. Embedding those solutions into the banking experience represents a significant growth opportunity for banks.

**Notes**

**SESSION 3**

Wednesday October 6, 11:30 a.m. - Noon CST

**Shawn  
Dillon**

President

Fitech Payments

**Key Takeaways**

1. Bankers tend to focus too much on deposits and loans. Fintechs know this and are exploiting the payments and UX void.
2. Square continues to aggressively push into competing with banks across both retail and business banking.
3. Marketing provides an opportunity to take data and truly leverage it to properly launch campaigns that influence customer outcomes.

**Notes**