

A photograph of three business professionals in a meeting. A man in a dark suit and tie is shaking hands with a woman in a white blouse. Another woman with curly hair is partially visible on the right, also smiling. They are seated at a conference table with a laptop, coffee cups, and papers. The background is a bright, modern office setting.

# LIFECYCLE OF A BANK MARKETER

Training, events and ongoing professional development designed for every stage of a bank marketer's career

# LIFECYCLE OF A BANK MARKETER

Find, develop and grow your bank's marketing talent through every stage of their careers.

## ATTRACT

- Promote marketing as a career of choice
- Purposefully develop a diverse team of bank marketers

## OFFBOARD

- Assistance with retirement and succession planning

## RECOGNIZE

- Develop and communicate specific development plans to fill key roles

## ONBOARD

- Jump-start effective job performance with onboarding training
- Communicate the organization's culture and ethics

## DEVELOP

- Implement a talent management program for marketing teams
- Manage performance

## ENGAGE AND MOTIVATE

- Ongoing training and education for bank marketers of every level
- Opportunities for in-role and career progression

# a path for every employee

Focused training for bank marketers and leaders in communications and the customer experience ensures they can upskill, transition to new roles and tackle new challenges. These talent management strategies are aligned with the employee lifecycle and include practical, ready-to-use resources from ABA.

## ATTRACT



### ATTRACT

#### Human Resources

Your home base for workforce development guidance

#### BankTalentHQ

Post open positions and find additional hiring resources

#### Online Training

Courses on interviewing and leveraging the benefits of a diverse workforce

## ONBOARD



### ONBOARD

#### Essential training for new team members.

- **Marketing in Banking** – facilitated course to get up to speed on the basics of bank marketing and develop core skills
- **Marketing in a Digital World: Digital Campaigns** – three-course series on digital and mobile advertising, as well as search engine optimization (SEO)
- **Recognizing and Preventing UDAAP** – course on how to comply with federal laws covering unfair, deceptive, or abusive acts and practices. Free for ABA member banks
- **Ethical Issues for Bankers** – cornerstone course that explores ethical standards for financial services professionals



## DEVELOP

- **Marketing Management** – facilitated course on best practices for managing a bank’s brand, public relations and digital marketing campaigns, and how this can deliver a strong return on investment (ROI)
- **Marketing Planning** – facilitated course on how to develop skills for preparing a comprehensive strategic marketing plan and creating a budget

### Bank Marketing School

- Learn strategic marketing skills from expert faculty that will increase your bank’s bottom line, then demonstrate what you learned by creating a marketing plan for a fictional bank



## ENGAGE AND MOTIVATE

### ENGAGE AND MOTIVATE

#### Nationally Recognized Professional Certification

- **Certified Financial Marketing Professional (CFMP)** – the only industry-recognized certification for bank marketers to demonstrate mastery of today’s essential bank marketing and management principles
- **CFMP Exam Online Prep** – prepare for the CFMP exam with self-paced online training tailored to the knowledge and job tasks on the test

### Data and Analytics

- Gain the skills to be consistently decisive, analytical and agile in interpreting data.

### DEI

- A resource area for leading insights and tools to foster an equitable, inclusive workplace and ensure your team is positioned for success

### Women in Banking

- Podcasts, articles, training and more designed for women in the industry to build strong networks and advance their careers

### Learning Opportunities with Continuing Education Credits

- **Bank Marketing Conference** – engage with peers and keep up with the latest strategies and skills to drive growth, creativity and customer satisfaction
- Webinars, presentations and online training, including the Fundamentals of Successful Digital Marketing series

## RECOGNIZE



## RECOGNIZE

Rewards and challenging experiences make a difference. Incorporate these recognition and leadership opportunities into your professional development offerings.

- ABA-Wharton Emerging Leaders Certificates – three certificate courses covering strategy, engaging and motivating talent, and advanced leadership. Each is led by preeminent faculty from the prestigious University of Pennsylvania Wharton School
- Emerging Leaders Forum
- Women and Allies Symposium
- ABA Brand Slam – awards program celebrating the best in bank marketing, with winners announced at the ABA Bank Marketing Conference

### Senior-Level Events

- Diversity, Equity and Inclusion Summit
- Annual Convention
- Conference for Community Bankers
- Stonier Graduate School of Banking

## OFFBOARD



## OFFBOARD

### Succession Planning Toolkit

Do you have a plan for who will next lead your marketing team? This toolkit includes an easy-to-follow framework for identifying new leaders across the organization and managing critical staffing transitions.

### Retirement and Turnover

With a wave of baby boomers retiring, plus the normal rate of staff turnover, proactive planning is essential. ABA can help you think strategically about benefits and practices to successfully offboard staff.

# STAY CONNECTED AND INFORMED

## PEER NETWORKS

### **ABA Bank Marketing Network**

A members-only forum facilitating marketing-focused discussions and peer conversations.

## FOCUSED NEWS

### **Bank Marketing Newsletter (from *ABA Banking Journal*)**

A bimonthly digest to help you stay in the know on what's happening in bank marketing across the industry.

### **ABA Daily Newsbytes**

Morning news so you can stay up to date on what's happening in Congress, at the regulatory agencies and at ABA.

# what bankers are saying

“ The CFMP allows you to gain the resources and understanding of the banking process and sync that up with **your marketing vision** or how the marketing funnel works. And it gives you more legs with your creative ideas as well as your digital and traditional brand execution. ”

**John Hanley, CFMP**  
Equity Bank

“ **ABA Bank Marketing Conference** challenges your thinking. It opens you up to perspectives you might not have. ”

**Craig Rodenberger,**  
Ephrata National Bank

“ Everybody on my marketing team is encouraged to attend the **ABA Bank Marketing School.** ”

**Leanne Kassab, CFMP**  
CNB Bank





# what the CFMP can do for you

**“ Absolutely do it.  
The CFMP is amazing.**  
Shows you have acumen  
and are a well-rounded  
marketer. The more  
professional development  
you can do, the more it will  
help your career.”

**Theresa Wendhausen, CFMP**  
First National Bank and Trust



A professional photograph of a Black man in a dark blue suit, white shirt, and black tie. He is smiling broadly, showing his teeth, and has his arms crossed. He is wearing a gold watch on his left wrist. The background is a blurred outdoor setting with greenery and a building.

# preparing today's bank marketing professionals

Customer expectations are quickly evolving, and your marketing team makes the first impression for your bank. Ensure your marketers have the core skills and knowledge for every stage in the marketing career lifecycle with the help of ABA.



**CFMP**

**bank marketing training  
that meets the needs of  
your staff**



1333 New Hampshire Avenue, NW  
Washington, DC 20036