



**CUNA**  
**Marketing & Business**  
**Development**  
**COUNCIL**

***17<sup>th</sup> Annual***

**CUNA Marketing & Business  
Development Council  
Conference**

**March 21-24, 2010**

**Sponsor Logistical  
Information**



## Introduction

*Thank you* for your tremendous support of the 17<sup>th</sup> Annual CMBDC conference! Without it, we would not be able to provide the exceptional conference that our members have come to expect.

The CMBDC conference attracts attendees from full-service credit unions who are key decision makers and excellent sales prospects. As a sponsor, you'll have the opportunity to network with attendees, attend conference educational sessions, and show the value your company offers.

For conference information, visit [cunamarketingcouncil.org](http://cunamarketingcouncil.org)



## Your Sponsorship Includes:

- Your company name, description and sales contact information printed in the conference handbook that attendees receive onsite
- Attractive signage at the event in which you sponsor
- A link to your Web site from the Marketing & BD Council Web site
- The ability to attend all functions associated with the conference
- A complete listing of conference attendee's contact information
- For an additional fee, sponsors have the option of purchasing six-foot display space for \$1,000 or ten-foot exhibit space for \$2,000 to use throughout the conference.
- Complimentary conference registrations, depending on your level of sponsorship.
- The ability for discreet literature distribution during your sponsored event.

## Conference Attendee List:

On February 16 and 23, and March 2, 9, & 16, **paid** sponsors will receive a roster of conference attendees, in addition to a demographic report. We hope that the list will help you in preparing for the conference where you will have ample opportunity to network with the attendees at the social events, educational sessions and networking breaks.

No activities may be scheduled at any time that will draw participants away from sessions or other conference activities.



## Exhibit Area:

The sponsor display area, located in the **International Ballroom East** (Welcome Center) provides a setting for sponsors to demonstrate their respective offerings. Each sponsor who has paid the additional fee (see list on page 6) will have use of a six-foot or ten-foot area, depending on the fee paid.

This is not a typical exhibit hall with dedicated hours, but rather a sponsorship program that allows you to attend all sessions and social events. We encourage you to attend sessions and mingle with credit union attendees to hear the questions and challenges they face, and evaluate services you can provide.

## Setup and Takedown

Sponsors who have paid the additional fee have the option of setting up their display during the following times: Saturday, March 20 from noon to 5 pm (if you want to be set up before registration opens on Sunday), or on Sunday, March 21 between the hours of 8 am to 3 pm. The conference registration desk will open on Sunday at 7:30 am. Please pick up your conference materials and plan on setting up your display in the International Ballroom East either Saturday or Sunday. There will be a disposable identification sign on your assigned space. (Booth numbers will not be assigned, as this is not a typical exhibit hall.)

Please be present at your display during conference registration, the Welcome Reception, breakfasts, and networking breaks. At all other times, you are strongly encouraged to attend all educational sessions and social events. It is also permissible to be present at your display anytime throughout the conference. Please refer to the schedule located on the next page.

Takedown can occur on Wednesday, March 24 between the hours of 9:15 am and Noon.



# Display Area: Schedule

## **2010 WELCOME CENTER SCHEDULE – International Ballroom East** *(As of 1-20-10 – Subject to Change)*

Saturday, March 20, 2010	Noon – 5:00 pm	Setup of Sponsor Displays (Option #1 setup time)
<hr/>		
Sunday, March 21, 2010	8:00 am – 3:00 pm	Registration/Setup of Sponsor Displays (Option #2 setup time)
	4:00 pm – 6:30 pm	Welcome Center Opens
	6:30 pm – 8:00 pm	Welcome Reception
<hr/>		
Monday, March 22, 2010	7:30 am – 8:15 am	Breakfast
	10:00 am – 10:30 am	Networking Break
	2:45 pm – 3:15 pm	Networking Break
<hr/>		
Tuesday, March 23, 2010	7:15 am – 8:00 am	Breakfast
	9:15 am – 9:45 am	Networking Break
	11:00 am – 11:15 am	Networking Break
	2:00 pm – 2:15 pm	Networking Break
<hr/>		
Wednesday, March 24, 2010	8:30 am – 9:00 am	Breakfast – Optional Drawings
	9:15 am – Noon	Display Tear Down



## Electrical Power and/or Internet Access

Internet access and electricity are not included with your display space purchase. To order these services, here are links to the forms in which you can place your order directly through the hotel:

**(INSERT LINKS TO FORMS)**

Since there will not be booth numbers assigned, simply indicate "International Ballroom East" as your location when completing the form.

### List of Sponsors with Display Space:

The following is a list of sponsors who have paid the additional fee and will have use of display space in the International Ballroom East:

#### **6' DISPLAY TABLE:**

Bancography  
brassMedia, Inc.  
Captive Indoor Media  
CU\*SWAG  
Digital Insight  
Harland Clarke  
iDiz, Inc.  
Marquis Software Solutions  
Member Research  
Priority  
Raddon  
The Centsables  
The Daniel Group

#### **10' BOOTH SPACE**

American Express  
Business Innovations  
Callahan & Associates  
Consumer Benefit Services, Inc.  
Data Concepts / AdQue  
DocuMatix  
inLighten  
Matrix Manager  
PSB, The Marketing SuperSource  
Redbeard Communications, Inc.  
Third Degree Advertising  
Weber Marketing Group



## Shipping Instructions to Hotel:

The hotel will charge for storage, handling and delivery of vendor items, which will be at your company's expense. Please reference the attached forms for a list of hotel handling charges incurred based upon the weight of each item..

If you will be shipping a display or literature to the hotel, please mark them to your attendee's attention with their arrival date, and schedule it to arrive no earlier than Friday, March 19.

The hotel address is:

Washington Hilton Hotel

ATTN: Your attendee's name, arriving xx/xx/xx

Please hold for: CUNA Marketing & Business Development Council Conference

1919 Connecticut Avenue, NW

Washington, DC 20009

Telephone: 202.483.3000

There will not be a drayage company associated with this conference.

## Return Shipping Instructions:

You can bring your own forms for your return shipment, or contact the hotel for shipping forms when you are ready to package your materials.



## Drawings:

Drawings are optional. If you would like to conduct a prize drawing, please advise us in advance by emailing [bbischke@cuna.com](mailto:bbischke@cuna.com) and provide the name of the person from your organization who will announce the winner, and what the prize is. Your representative will be called to the microphone to make the announcement. Please take your prize and winner's name to the Welcome Center on Wednesday, March 24 at 8:30 am where the announcements will occur. If you are unable to be present, an Executive Committee member would be happy to announce the winner on your behalf.

## Presentation Handouts:

As in previous years, conference handouts will be posted to the CMBDC Web site approximately two weeks prior to the start of the conference and will remain available after the conference. If you are a registered attendee for the conference, you can access and print the handouts for the sessions you plan to attend. A link will be sent as soon as the presentations are posted. Copies of presentations will not be provided at the conference.

## Cancellation Policy:

Refunds will be issued until five weeks prior to the start of the conference, or February 15. No refunds will be available after this date. All cancellations must be submitted in writing to [bbischke@cuna.com](mailto:bbischke@cuna.com).



## Important Reminders:

- ❑ Sponsorship Registration – Please be sure you have registered for your sponsorship. Here is the link: [https://secure.cuna.org/councils/mbd/events/partnersprogram\\_form.html](https://secure.cuna.org/councils/mbd/events/partnersprogram_form.html)
- ❑ Attendee Registration – Included with your sponsorship are complimentary conference registrations, depending on your level of support and outlined on your confirmation letter. If you plan to attend the conference, please register for the conference using this link: [https://secure.cuna.org/councils/mbd/events/conf\\_10/conf10\\_reg.html](https://secure.cuna.org/councils/mbd/events/conf_10/conf10_reg.html)
- ❑ Hotel Reservation – Please make your hotel reservation directly with the hotel. The phone number for reservations is 202-483-3000. Reference the CUNA Marketing & Business Development Council to receive the rate of \$199 plus taxes.
- ❑ Sponsor Thank You Reception – Tuesday, March 23 from 4:15 to 5:00 pm. – Invitations will be emailed soon.

## Attachments:

- A/V Pricing Guide
- Internet Services Order Form
- Electrical Order Form
- Sponsor Thank you Reception Invitation
- Sponsor Success Guide



## Questions:

If you have questions at any time, please contact:

Tim Draper, Sponsorship Committee Chair  
VP Marketing, Navigant Credit Union, RI  
Telephone: 401-233-4316  
E-mail: [tdraper@navigantcu.org](mailto:tdraper@navigantcu.org)

Bobbi Bischke, Council Sponsorship Program Manager  
Credit Union National Association  
Telephone: 800-356-9655, ext. 4018  
E-mail: [bbischke@cuna.com](mailto:bbischke@cuna.com)



## TESTIMONIALS FROM EXISTING CUNA COUNCIL CONFERENCE SPONSORS:

- "As a vendor, I would rate this conference very high. The audience is targeted and from the beginning we were able to tailor our message to their needs. At the big conferences, vendors waste a lot of time trying to find the people they want to hear their message. This work was done in advance for us because the conference is so specific to the needs of operations and sales decision-makers."
- "While the overall attendance may have been lower, we found that the attendees who did come were serious about being there due to the economic challenges."
- "The CUNA Council conferences have consistently been my favorite meetings of the year. The content is relevant, the sessions are engaging, and while the conference provides many takeaways and good information, it is festive and social. Thank you for putting together another great event!"

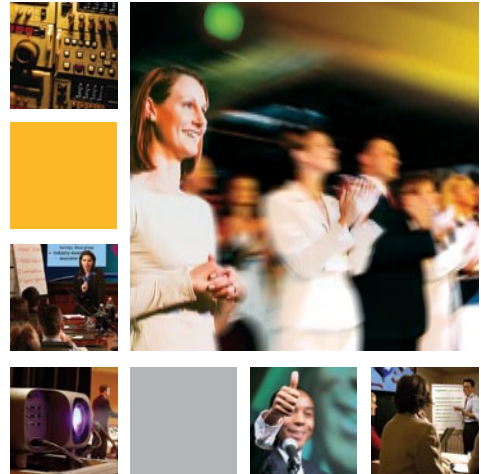


- "You have far exceeded the other trade associations in our industry with your continued commitment to the education of credit union marketers. When marketers need it the most, you seek new and innovative ways to cope with membership, growth and the economy. As marketers and as an industry already searching for a larger national presence, you would take that extra step to find ways to help others in our industry who aren't able to come to some of these conferences...helping others so we can better help the member."
- "As a sponsor, I think there is great value in the variety of activities. I enjoyed some of the sessions and it was a great way to hear what is on the minds of the members."
- "In order to provide appropriate service to our clients, it is very helpful to learn alongside them."
- "Attending sessions allows for one on one time. I got to sit next to some of my top prospects at the lunch and awards dinner! Also, all of us are able to learn about credit union topics as well so we can serve our clients better."
- "The CUNA Councils are the best at inclusion of vendors. Thank you so much for that."



# audiovisual

# services



Whether you are planning an intimate board meeting or an elaborate production, you can count on our experienced team to provide a full range of capabilities to help deliver your message through light, sound, video and data projection.

As a leader in the industry, we invest in the newest technology enabling us to respond to your every meeting need. We offer a full line of projection, lighting, staging, audio equipment and numerous meeting essentials. All of our state-of-the-art equipment is maintained and operated on-site at the Hilton Washington by dedicated audiovisual professionals. We understand that you rely on our expertise to successfully deliver your meeting message. Our on-site team members are well-trained professionals, with a dedication to guest service.

## POPULAR PACKAGES

### COMPUTER DISPLAY PACKAGE \$775.00/DAY

Meeting Room LCD Projector  
Projection Cart/Stand  
Tripod Screen  
All Cabling, Extension Cords, etc.  
Add Wireless Mouse for \$60

### PRESENTATION SUPPORT PACKAGE \$80.00/DAY

6', 7', or 8' Tripod Screen  
Projection Cart  
Power Cable and Power Strip  
Basic setup assistance  
Add a Wireless Mouse for \$60  
Add a Flipchart for \$55

### VIDEO DISPLAY PACKAGE I \$235.00/DAY

VHS Video Cassette Recorder  
Color Monitor  
54" Display Cart  
All Cabling, Extension Cords, etc.  
Add an additional Monitor for \$150

### VIDEO DISPLAY PACKAGE II \$275.00/DAY

DVD Player  
Color Monitor  
54" Display Cart  
All Cabling, Extension Cords, etc.  
Add an additional Monitor for \$150

### OVERHEAD PROJECTION PACKAGE \$165.00/DAY

Overhead Projector  
Projection Cart/Stand  
6', 7', or 8' Tripod Screen  
All Cabling, Extension Cords, etc.

Package pricing does not include an 18% service charge.



## AUDIO COMPONENTS

No company or client is permitted to patch any audio equipment into the house sound system

### MIXER/AMPLIFIERS

4 Channel Mono Mixer	\$60
12 Channel Stereo Mixer	\$180
24 Channel Stereo Mixer	\$360
Stereo Amplifier	\$150
Stereo Equalizer (PSAV Operator Required)	\$125
F/X & Signal Processing Rack (PSAV Operator Required) Call for Details	

### SPEAKERS

Powered Speaker	\$85
Full Range Speaker	\$85
Bass Cabinet	\$85
Stereo Amplifier	\$150

Contact PSAV to discuss other audio options such as

- Recording your event
- Large Venue/Concert Sound Systems

### MICROPHONES

Wired Microphone	\$45
Wired Lavalier	\$55
PZM Microphone	\$55
Wireless Microphone - Lavalier	\$175
Wireless Microphone - Handheld	\$175

### PLAYERS/RECORDERS

Mono Cassette Deck	\$65
Stereo Cassette Deck	\$85
CD Player	\$75

## PROJECTION COMPONENTS

### 35MM PROJECTION/ACCESSORIES

Kodak 35mm Slide Projector	\$100
Wireless Remote	\$45
Brite-Lite Lamp Module	\$50
6" - 9" Zoom Lens	\$25

### OVERHEAD PROJECTORS

Standard Overhead	\$85
High Intensity Overhead	\$200

## VIDEO COMPONENTS

### VIDEO/DATA PROJECTION

Meeting Room Projector	\$700
Event Projector	\$1,300
Premiere Projector	\$2,500
Platinum Projector	Call for Details

### VIDEO/DATA MONITORS

26" Video Monitor	\$150
35" Video Monitor	\$225
32" LCD Monitor	\$350
35" Plasma Monitor	\$575
42" Plasma Monitor	\$775
50" Plasma Monitor	\$975
60" Plasma Monitor	\$1,500

### PLAYERS/RECORDERS

VHS Player/Recorder	\$85
DVD Player	\$125

### CAMERAS

Camcorder	\$225
Camera Tripod	\$75

Contact PSAV to discuss Image magnification & multiple camera options.

## LIGHTING COMPONENTS

Podium Lighting Package	\$175
Follow Spot Light (PSAV Operator Required)	\$200
Video Lighting Kit-3 lights, 300 Watts each	\$350
Contact PSAV to discuss special Lighting Packages for your event	

## SCREENS & DRAPES

### STANDARD SCREENS

Tripod Screen	\$55
12' Cradle Screen	\$150

### PROFESSIONALLY DRESSED FAST FOLD SCREENS & DRAPES

6' x 8'	\$175
7.5' x 10'	\$240
9' x 12'	\$320

Other Screen sizes available upon request.

## COMPUTERS

Laptop Computer - Pentium IV	\$300
Desktop Computer - Pentium IV	\$250

## VIRTUAL SPEAKER SERVICES

Call PSAV about Network Engineering options that can improve your Internet experience.

## EVENT SUPPORT EQUIPMENT

Flipchart w/Markers	\$55
Laser Pointer	\$45
34"/54" Projector Cart	\$35
Speaker Timer	\$150
Nextel Radio	\$65
Press Mult Box	\$125
Wireless Mouse	\$55
Conference Speakerphone	\$175

## LABOR RATES

Technicians are available at the following rates on a 4-hour minimum:

Monday — Friday 7am–5pm	\$65.00/hr
Monday — Friday 5pm–midnight	\$97.50/hr
Monday — Friday midnight–7am	\$130.00/hr
Saturday and Sunday 7am–5pm	\$97.50/hr
Saturday and Sunday 5pm–7am	\$130.00/hr
All Holidays	\$130.00/hr

Labor will be charged for set-up and tear-down of video projection, multi-image, audio reinforcement systems, stage lighting, fast-fold screens, and drape at the rates listed above.

All prices listed are per room per day.

Any equipment or technician canceled within 24 hours of a function's start time will be billed at full price.

There will be an 18% service charge on all equipment rental.

If you do not see a specific item needed to make your meeting a success, please call our Presentation Services office at 202.232.6184.

[Click here to visit PSAV at the Washington Hilton online.](#)

**PSAV**  
PRESENTATION SERVICES

Service is First, in everything we do.



**HIGH SPEED INTERNET REQUEST**

We are pleased to announce that we are now able to offer high-speed Internet access. This service provides access that is 175 times faster than a standard dial-up connection. The high speed system is available to you, in all of our Meeting Rooms and Exhibit Hall. Note, the system does require you to have your own PC or laptop, with a browser, plus an Ethernet card.

<b>NAME OF SHOW:</b>		<b>DATE OF SHOW:</b>	
<b>Installation</b>	<b>Date:</b>	<b>Day:</b>	<b>Time:</b>
<b>Removal</b>	<b>Date:</b>	<b>Day:</b>	<b>Time:</b>
<b>Group/Convention:</b>			
<b>Client Contact:</b> _____			
<b>Company Name:</b> _____			
<b>Address:</b> _____			
<b>City:</b> _____	<b>State:</b> _____	<b>Zip code:</b> _____	
<b>Phone number:</b> _____			
<b>Master Account:</b> _____			
<b>Credit Card Holder:</b> _____		<b>Type:</b> _____	
<b>Card Number:</b> _____		<b>Exp:</b> _____	
<b>Room Charge / Guest Name:</b> _____		<b>Room #</b> _____	

**Meeting room:** \_\_\_\_\_ **Location in room:** \_\_\_\_\_

**If in Exhibit Hall, Note Booth Number:** \_\_\_\_\_

Services	#Days	#Lines	Cost
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**INTERNET LINES: 1.5 mpbs line**

<ul style="list-style-type: none"> <li>▪ <b>First Computer</b> Up to 2 days: \$ 375.00/per day</li> </ul>	_____	x <u>1</u>	_____	
<ul style="list-style-type: none"> <li>▪ <b>Each Additional Computer</b> For the Same Group or Exhibitor: \$ 110.00/per day</li> </ul>	_____	x _____	_____	
<ul style="list-style-type: none"> <li>▪ <b>First Computer/"Hook up" Fee</b> 3 or more days: \$ 825.00</li> </ul>	_____	x <u>1</u>	_____	(flat fee)
<ul style="list-style-type: none"> <li>▪ <b>Each Additional Computer</b> 3 or more days: For the Same Group or Exhibitor: \$ 125.00</li> </ul>	_____	x _____	_____	(flat fee, per computer)
<ul style="list-style-type: none"> <li>▪ <b>Ethernet Hub</b> Required for Multiple PCS \$100.00</li> </ul>	_____	_____	_____	
<b>Taxes (5.75%)</b>			_____	
<b>Total Cost</b>			_____	

**Special Notes:**

1. All orders must be pre-paid and received by the Hilton Washington two weeks prior to show opening. **Any order received within two weeks of show set-up or on-site will be charged a \$75.00 late fee.**
2. It is your responsibility to confirm receipt of order.
3. NO VERBAL ORDERS ACCEPTED!
4. In order to serve you better, please attach any information, diagrams, etc. that will assist our staff.
5. If you are tax exempt in Washington, D.C. please enclose your tax exempt certificate number.
6. For questions regarding Internet service please call The Engineering Department at (202) 797-5802.
7. Prices are subject to change without notice.
8. By providing billing information, above, and signing, below, all charges as indicated are valid and authorized.

**RETAIN ONE COPY AND RETURN ALL OTHER COPIES WITH PAYMENT TO THE HILTON WASHINGTON, 1919 CONNECTICUT AVE., N.W. WASHINGTON, D.C. 20009**  
**ATTENTION: CONTROLLER OR VIA FAX 202-328-2077**

\_\_\_\_\_  
**(Signature Authorization)**

**COMMENTS:**



Hilton Washington  
 1919 Connecticut Avenue NW  
 Washington, DC 20009  
 Telephone (202) 483-3000

**ELECTRICAL & MECHANICAL SERVICE ORDER FORM**  
*(Type or print clearly, all information)*

Name of Show : \_\_\_\_\_

Show Dates: \_\_\_\_\_ Booth # or Room Name: \_\_\_\_\_

Company Name: \_\_\_\_\_

Company Address: \_\_\_\_\_

Company Phone: \_\_\_\_\_ Contact Name: \_\_\_\_\_

**Special Notes:**

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4. For questions regarding Electrical service please call The Engineering Department at (202) 797-5802.
5. In order to serve you better, please attach any information, diagrams, etc. that will assist our staff.
6. If you are tax exempt in Washington, D.C. please enclose your tax exempt certificate number.
7. All wiring must meet local codes and ordinances.
8. If additional requirements are needed during setup, payment must be made upon completion of service.
9. The District of Columbia Code requires that no electrical equipment or apparatus can be connected unless it conforms to its electrical code. The Hotel will supply a qualified electrician to install and correct any minor infraction at stated labor cost.

**RETAIN ONE COPY AND RETURN ALL OTHER COPIES WITH PAYMENT TO THE HILTON WASHINGTON, 1919 CONNECTICUT AVE., N.W. WASHINGTON, D.C. 20009 ATTENTION: CONTROLLER OR SEND VIA FAX TO 202-328-2077.**

**LIST REQUIREMENTS BELOW**

Electrical Requirements:	Quantity	Total	Mechanical Requirements:	Quantity	Total
120 Volts 60 Cycle 20 AMPS <b>\$120.00/each</b> (Standard wall outlet)	_____	_____	Compressed Air (100PSI) Water & Drainage: <b>\$290.00 per hook-up + labor</b>	_____	_____
Lighting: 150 watt flood (installed on ceiling track) Exhibit Hall only <b>\$50.00/each</b>	_____	_____	Plumbing Labor Rates: <b>\$60.00</b> Mon through Fri 8AM-4PM (1 hour min.)	_____	_____
208 Volt (single phase) 20 AMPS <b>\$195.00 + labor</b>	_____	_____	<b>\$80.00</b> Overtime Rate (four hour min.)	_____	_____
208 Volt (three phase) 20 AMPS <b>\$215.00 + labor</b>	_____	_____	Bottled Gas <b>Market Price + \$120.00</b> (handling charges)	_____	_____
208 Volt (single phase) 30 AMPS <b>\$300.00 + labor</b>	_____	_____	24 Hour Power <b>\$120.00 per day</b>	_____	_____
208 Volt (three phase) 30 AMPS <b>\$390.00 + labor</b>	_____	_____	Banners ( <b>\$6.00 per linear foot</b> ) <b>Minimum order \$60.00</b>	_____	_____
440 Volt (three phase) Requires special requirements *	_____	_____	<b>Antenna Run \$240.00</b> <b>Exhibitor must supply cable</b> <b>and antenna</b>	_____	_____
Labor Rate: Weekdays 8AM-4PM (one hour minimum) \$60.00	_____	_____			
After 4PM Weekends & Holidays (four hour minimum) <b>\$95.00/hour</b>	_____	_____			
Additional Extension Cord Rental <b>\$30.00/each</b>	_____	_____			

**Late Fee:** \_\_\_\_\_  
**Subtotal:** \_\_\_\_\_  
**5.75% Sales Tax** \_\_\_\_\_  
**Total** \_\_\_\_\_  
**Prepaid** \_\_\_\_\_  
**Add'l Charges** \_\_\_\_\_  
**GRAND TOTAL** \_\_\_\_\_

**ADDITIONAL REQUIREMENTS:** \_\_\_\_\_  
 \_\_\_\_\_

**BILLING INFORMATION:** By providing billing information and signing below, all charges as indicated are valid and authorized.

Credit Card # : \_\_\_\_\_ Exp. Date: \_\_\_\_\_

Name on card: \_\_\_\_\_

Authorized Signature \_\_\_\_\_



*The CUNA Marketing &  
Business Development Council  
Executive Committee  
Cordially Invites You to Attend  
a Sponsor "Thank you" Reception*

**Date:** *Tuesday, March 23, 2010*  
**Time:** *4:15 to 5:00 p.m.*  
**Location:** *TBD*  
**Attire:** *Business Casual*  
**RSVP:** *Please RSVP by March 12 to  
Bobbi Bischke:  
E-mail: [bbischke@cuna.com](mailto:bbischke@cuna.com)*

*We'd like you to take this opportunity to provide  
feedback on the Sponsorship Program. Or you can  
simply enjoy the reception as our way of saying  
"thank you!"*

*Hope to see you there!*

*CMBDC Executive Committee*

*Anne Legg, Chair, VP Marketing, Cabrillo CU - CA  
Sean McDonald, Vice Chair, BD Director, Liberty Savings CU - NJ  
Lesley Carrell, VP Marketing, Fibre CU - WA  
Amy Davis, VP Marketing, Red Canoe CU - WA  
Kathryn Davis, SVP Marketing/HR, Xceed Financial CU - CA  
Tyler Disburg, Chief Administration Officer, Montana First CU - MT  
Tim Draper, VP Marketing, Navigant CU - RI  
Michelle Hunter, SVP Marketing & Development, CU of Southern  
California  
Rene McKee, VP Marketing, California Coast CU - CA  
Susan Miller, Business Development Officer, Delta Community CU - GA  
Carol Payne, VP Communications & Marketing, California CU League*



# SPONSOR SUCCESS GUIDE

*Tips to Plan, Promote & Sell More  
at CUNA Councils' Conferences*



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### **About the Sponsorship Program**

Our members know how important vendor partners are to their success as credit union executives. We also know how important it is for you to be able to reach credit union executives across the country with information on your products and services. And we've been told that vendors want to show support for the CUNA Councils in a way that's meaningful to the relationships you want to build.

Our sponsorship program provides you with an opportunity to show your support while gaining a high-profile image with the country's premier credit union executives. Here's a chance to have the attention of hundreds of relevant decision makers all in one place.

Through the Partners program, you'll be able to sponsor popular social events and dynamic educational sessions that give the conference its unique feel and flavor. There's no need to staff an exhibit booth and hope that the right participants stop by. Our program allows you to mix and mingle with all participants while showing financial support in a public way. Your support will earn the respect of executives, and the thanks of the Council through signage, the program guide, and other public recognition. In addition, it will allow you the opportunity to discuss your services/products in detail to a captive audience.

Participation in our sponsorship program will mean a high profile with just the right credibility, attracting the attention of the most influential group of credit union executives.

This guide contains general information we've gathered for you to maximize your sponsorship and make it the best possible experience for you and our members.

### **Questions?**

If you ever have any questions about the program, please feel free to contact Bobbi Bischke at [bbischke@cuna.coop](mailto:bbischke@cuna.coop), or 1-800-356-9655, ext. 4018.

## **Council Sponsor Testimonial**

### **Highlights**



*"In order to provide appropriate service to our clients, it is very helpful to learn alongside them."*

- CMBDC Sponsor

*"As a vendor, I would rate this conference very high. The audience is targeted and from the beginning we were able to tailor our message to their needs. At the big conferences, vendors waste a lot of time trying to find the people they want to hear their message. This work was done in advance for us because the conference is so specific to the needs of operations and sales decision-makers."*

- OpSS Sponsor

*"The CUNA CFO Council conference has consistently been my favorite meeting of the year. The content is relevant, the sessions are engaging, and while the conference provides many takeaways and good information, it is festive and social. Thank you for putting together another great event!"*

- CFO Sponsor

*"You have far exceeded the other trade associations in our industry with your continued commitment to the education of credit union marketers. When marketers need it the most, you seek new and innovative ways to cope with membership, growth and the economy. As marketers and as an industry already searching for a larger national presence, you would take that extra step to find ways to help others in our industry who aren't able to come to some of these conferences...helping others so we can better help the member."*

- CMBDC Sponsor

*"As a sponsor, I think there is great value in the variety of activities. I enjoyed some of the sessions and it was a great way to hear what is on the minds of the members."*

- CMBDC Sponsor

*"Attending sessions allows for one on one time. I got to sit next to some of my top prospects at the lunch and awards dinner! Also, all of us are able to learn about credit union topics as well so we can serve our clients better."*

- CMBDC Sponsor

*"The CUNA Councils are the best at inclusion of vendors. Thank you so much for that."*

- HR/TD Sponsor

# Seven Deadly Exhibiting Sins and How to Avoid Them

By: Susan A. Friedmann, CSP, The Tradeshow Coach

Since exhibiting comprises so many different components and functions, it's no wonder that we make blunders trying to remember everything that needs doing. However, some are more lethal than others and as such should be avoided at all costs. The following seven points fall into that category. Learn to avoid them and you will increase your chances for a more successful and profitable tradeshow.

## ***Sin #1: Failing to have a proper exhibit marketing plan.***

In order to make tradeshow a powerful dimension your company's overall marketing operation, there must be total alignment between the strategic marketing and your exhibit marketing plan. Tradeshow should not be a stand-alone venture. Know and understand exactly what you wish to achieve - increasing market share with existing users; introducing new products/services into existing markets or into new markets; or introducing new products/services into new markets. This is the nucleus on which to build your program, which should include pre-show, at-show and post-show promotional activities. Know whom you want to target and then consider having different promotional programs aimed at the different groups you are interested in attracting.

## ***Sin #2: Failing to set quantifiable exhibiting goals.***

Goals, or the purpose for exhibiting, are the essence of the whole tradeshow experience. Knowing what you want to accomplish at a show will help plan every other aspect - your theme, the booth layout and display, graphics, product displays, premiums, literature, etc. Exhibiting goals should complement your corporate marketing objectives and help in accomplishing them. Make sure they can be measured after the show to establish how well you did.

## ***Sin #3: Failing to build brand awareness with your booth.***

On the show floor your exhibit makes a strong statement about who your company is, what you do and how you do it. Everything your company stands for, no matter how large or small, is being exhibited on the show floor. This means that there needs to be total consistency, congruity, clarity and focus in every aspect of your exhibiting program, before, during and after the show. The purpose of your exhibit is to attract visitors so that you can achieve your marketing objectives. In addition to being an open, welcoming and friendly space, there needs to be a focal point and a strong key message that communicates a significant benefit to your prospect. Opt for large graphics rather than reams of copy. Pictures paint a thousand words while very few attendees will take time to read. Your presentations/demonstrations are a critical part of your exhibit marketing. Create an experience that allows visitors to use as many of their senses as possible. This will help to enhance memorability.

## ***Sin #4: Failing to give visitors an incentive to visit your booth.***

Whatever promotional vehicles you use - direct mail, broadcast faxes, advertising, PR, sponsorship, and the Internet, make sure that you give visitors a reason to come and visit you. With a hall overflowing with fascinating products/services, combined with time constraints, people need an incentive to stop at your booth. First and foremost their primary interest is in "what's new!" They are eager to learn about the latest technologies, new applications, or anything that will help save them time and/or money. Even if you don't have a new product/service to introduce, think about a new angle to promote your offerings.

## ***Sin #5: Failing to have giveaways that work.***

Tied into giving visitors an incentive to visit your booth is the opportunity to offer a premium item that will entice them to stop. Your giveaway items should be designed to increase your memorability, communicate, motivate, promote or increase recognition of your company. Developing a dynamite giveaway takes thought and creativity. Consider what your target audience wants, what will help them do their job better, what they can't get elsewhere, what is product/service related and educational. Think about having different gifts for different types of visitors. Use your website to make an offer for visitors to collect important information, such as an executive report, when they visit your booth. Giveaways should be used as a reward or token of for visitors participating in a demonstration, presentation or contest, or as a thank-you for qualifying information about specific needs etc.

***Sin #6: Failing to realize that your people are your marketing team.***

Enormous time, energy and money are put into organizing show participation - display, graphics, literature, premiums, etc. However, the people chosen to represent the entire image of the organization are often left to fend for themselves. They are just told to show up. Your people are your ambassadors. They represent everything your company stands for, so choose them well. Brief them beforehand and make sure they know: *why you are exhibiting; what you are exhibiting and what you expect from them.* Exhibit staff training is essential for a unified and professional image. This means making sure that they sell instead of tell; they don't try to do too much; they understand visitor needs; they don't spend too much time with visitors; and finally, they know how to close the interaction with a commitment to follow-up.

***Sin #7: Failing to have a proper follow-up plan.***

The key to your tradeshow success is wrapped up in the lead-management process. The best time to plan for follow-up is before the show. Show leads often take second place to other management activities that occur after being out of the office for several days. The longer leads are left unattended, the colder and more mediocre they become. It is to your advantage to develop an organized, systematic approach to follow-up. Establish a lead handling system, set time lines for follow-up, use a computerized database for tracking, make sales representatives accountable for leads given to them, and then measure your results.

### **The Elevator Speech**

Rehearse with all booth staff, a four part "elevator speech" about your company or product.

- ⇒ Make an irrefutable statement about your company
- ⇒ Establish credibility using current customer names or statistics
- ⇒ List 2 or 3 benefits of doing business with your company, customer testimonials
- ⇒ End with a call-to-action or question of how the prospect could use your services.

- Candy Adams  
*The Booth Mom* ([www.boothmom.com](http://www.boothmom.com))

# **Avoid Booth Staff Duds: Thirteen Essential Questions You Have to Ask**

*By: Susan A. Friedmann, CSP, The Tradeshow Coach*

Booth staff selection is the single most important factor in your exhibiting success. More than graphics, signage, literature, giveaways, or any other variable, it is the people you put on the show floor that influence visitor's opinion of your organization. They are your ambassadors, representing your company for the whole world to see. It is impossible to stress enough how crucial your team is to your overall success.

To ensure a top notch performance, begin preparing your booth team four to six months prior to the event. You will need the answers to the following questions:

## **1. How many people are needed to staff the booth?**

A number of variables need to be considered. How big is your exhibit? How long is the show? Will you need employees to give product demonstrations, work the hospitality suite, teach seminars, or supervise contests? Ensure you have enough staffing to have your booth manned at all times, while giving your team a break every four to six hours. No one can be 'on' for twelve hours at a time.

## **2. Who are the best people to represent the organization?**

Working a trade show requires a unique mix of skills. You want employees with excellent product knowledge, superlative people skills, killer sales instincts, and a warm, engaging personality. These people should be motivated self-starters, able to think on their feet and work with little or no direction.

## **3. Has staff training been organized?**

To ensure success, prepare your team with all the skills and tools they need. Training should cover assessing visitor types, asking qualifying questions, handling difficult attendees, lead generation and follow up, and many other factors.

## **4. Has a pre-show meeting been scheduled?**

Pre-show meetings play a critical role in ensuring that your team understands their goals and objectives, expected roles and duties, and is adequately supplied with background knowledge to handle any unexpected surprises. Use this time to clarify any areas of confusion and to address any staff concerns.

## **5. Is the booth team familiar with the products or services being displayed?**

To effectively sell products, you need to have thorough, complete product knowledge. Too many times, organizations send out rookie employees who only possess rudimentary knowledge. This is frustrating for attendees, who won't come back to find another employee who might have an answer – they'll go to the competition instead.

## **6. Has a practice demonstration session been organized?**

Never assume that your employees know how to use the products that they sell. It is entirely possible that they are not completely familiar with every feature, especially if you are introducing a new product. Take the time to thoroughly train your team, and have them practice demonstrating the product to familiarize themselves with the show floor routine.

### **7. Will a technical representative be available to answer questions?**

Depending on your product/service line, it may be entirely appropriate to send a technical representative to handle specific product questions. Train this person in the basics of salesmanship, but keep their duties largely relegated to providing technical answers. Make sure they are aware of the possibility of trade show espionage, to prevent them from sharing too much information.

### **8. Has a dress code been established?**

Well before you arrive at the event, a dress code should be established. Uniforms may be appropriate for your company, but if they are not, clearly specify what you want your team to be wearing. “Casual business” gives far too much leeway. Instead, spell out “Black trousers or skirt, white shirt, black blazer, red tie,” or the equivalent.

### **9. Have badges been ordered for all booth personnel?**

Everyone on your team needs a badge to enter the show floor, access hospitality areas, and move freely about. Order these badges well ahead of time, so that any errors or omissions can be remedied in a timely fashion.

### **10. Do booth personnel have sufficient business cards?**

It is amazing how many business cards you can hand out during the course of one trade show. Make sure your team is adequately prepared.

### **11. Has a booth schedule been planned?**

A complete schedule will cover every moment from show arrival to departure. Include who will be staffing the booth, break times, technical support and assorted responsibilities. It may be a good idea to include ‘check in’ time into the schedule, so sales people acting as booth staff can check messages back at the home office and make needed phone calls. This will alleviate a great deal of staff anxiety.

### **12. Who will oversee booth installation and dismantling?**

Often overlooked, these two items can quickly become logistic nightmares if no one is prepared to address them. Delegate two people to this detail. Many show organizers provide this service for a fee, but you may still want to have staff members on hand supervising.

### **13. Does that person understand the move-out procedure?**

Someone has to arrange for moving the exhibit out of the convention center, ensuring it is properly packed, and coordinate shipping the whole thing back to the home office. Again, a team should be clearly delegated this responsibility, and provided with all the tools and resources they’ll need to succeed.

# Are You “Cell”ing Yourself Short?

By: Susan A. Friedmann, CSP, The Tradeshow Coach

Cell phones have changed our world. With few exceptions, we can now talk to anyone we like whenever we'd like. The staccato symphony of ring tones accompanies us through our days: from the morning commute to the crowded restaurant at lunchtime, during meetings and even during the quick stop at the grocery store when the day is done. We're always connected, always reachable. It's a marvel.

It's a marvel that can destroy your tradeshow performance.

Consider the following:

You're at a tradeshow. An attractive exhibit catches your eye. The product on display is exactly what you've been searching for. When you approach the booth, a staffer looks up and with a gesture indicates that you should wait, just one minute, while he finishes his call. When he's done talking to the important people, the message seems to be, he'll be happy to talk to you.

How long are you going to wait? After all, you've only a limited amount of time at the show, and there are dozens of other booths on your 'must-see' list. When you discover that the display just a little further down the aisle also appears to feature a product that could fill your needs, chances are that's all the impetus you'll need to move along. There's no sense waiting for the staffer to finish his call, not when there are other people who are more than ready to talk to you right now.

Let's flip the scenario around. You're on the other side of the aisle when your cell phone rings. Do you take the call?

I can hear you now. "But that's different! My call is important!"

Guess what? The salesman in the first example thought his call was important too. And it was -- to him. It was more important than you were, at least.

Talking on your cell phone tells tradeshow attendees three things:

- Your team's focus is NOT on the tradeshow.
- Your attendee is not the most important person in the room -- that honor belongs to whoever has your cell phone number.
- The attendee's business is not valuable to your company.

Add to this the very real possibility that attendees are listening to at least one side of your staffer's cell phone conversations. What might they be hearing?

- Confidential business details, including customer names, order size and more. What great info for your competitors to have.
- Intimate, personal conversations. Nothing's more off putting than TMI (too much information)!
- Humor or observations that may be considered offensive. What a PR nightmare!

How does this impact your marketing message? How does cell phone use by your staffers affect how that message is received by the show attendees?

It's entirely possible that cell phone use by your staff will eliminate the clear communication of your marketing message. Sad but true: that's the best you can hope for. Worse, and far more likely, attendees are getting different messages from your company, including:

- We're too busy for you.
- We're too important for you.
- We don't care about you.
- You're not worth our time.
- You don't deserve our attention.

Is that the message you want to send? Emphatically NO! That's why you need a cell phone policy. This policy will obviously vary by company, but should include the following:

- Cell phones must be shut off when you're on the floor.
- Give staffers regular breaks so they can check messages and make calls, away from the exhibit.
- Staffers who have personal reasons to be in constant contact (i.e. small children, ailing parents, etc.) should be encouraged to program their phones to signal 'high priority' calls with a distinctive ring or vibration pattern. That way, staffers can only answer emergency calls and let voice mail pick up the rest. This offers your team the security of being constantly connected while still keeping the focus on the tradeshow attendees.

Expect some resistance when first introducing this policy. Cell phones have become such a part of our lives that many people feel naked without them. Explain the benefits and reasoning of the policy. Minimize tension by being flexible, providing ample opportunity for staffers to 'check in', and leading by example. You can't tell your people to turn off their phones and then spend the day chatting on yours!

*Written by Susan A. Friedmann, CSP, The Tradeshow Coach, Lake Placid, NY, working with companies to improve their meeting and event success through coaching, consulting and training.*

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## **Capturing Leads & Contacts**

With today's privacy laws and anti-spam regulations, companies must be diligent in getting permission to follow-up with booth visitors by asking. If attendees say "yes" to being contacted after the conference, you can add them to your follow-up plans.

If they say "no", then you cannot.

If you are conducting a drawing in your booth, add a line on your lead form that asks, "Would you like a representative to call you to discuss the benefits of our new product?" Or, "Would you like to receive our quarterly newsletter?"

When your staff is qualifying an attendee they should ask, "Can I give you a call next week to continue our conversation? Would that be okay?" Following these simple procedures will give attendees a positive feeling about your company.

**- Barry Siskind**

International Training & Management Company

# Post-Conference: “They’re Only Young Once”

By: Steve Miller, Exhibiting Marketing Magazine

They get stuffed into pockets, tossed into briefcases, and packed into exhibitor cases. **Why, oh why, are so many trade show leads** left abandoned, growing old and valueless when in fact they could have been turned into sales?

Some estimates put the number of show leads that never get followed-up at as high as 50%. Why, you might ask, would someone spend the money and time on exhibiting only to leave the leads unworked! Distraction might be an answer.

*Trade show leads are hot. But every day, the leads cool down a degree or two.*

## Don't Leave Home Without It

The key to post-show success is to do most of the work before the show. Before you leave, as part of your pre-show planning, decide what you'll send as follow-up information. What literature do you plan to send? Do you have enough on hand? Who will send it out, and how?

## The Lead Form Will Lead You

If you fill out a lead form completely, you'll have the information for your follow-up. By including one sentence that refers back to something you talked about at the trade show, the prospect won't care that they are getting everything in a form letter. This planning is simple, easy, and will save you tremendous amount of time after the show.

Plus, it feels great to leave for the show knowing you've already made your follow-up plan.

## Too Slow or Too Fast

For those who do follow-up, there seems to be two prevailing schools of thought about when to send literature.

## *The Infinity School of Follow-Up*

This one has no time limit. You can follow-up any time between now and infinity.

## *Won't They Be Impressed School of Thought*

Under this system you send your leads at the end of each day and back to the office, where they are turned into information kits with form letters, and sent out to the prospect via overnight express.

Only on the surface this seems like a great idea, but it overlooks one point. After you've been out of the office for several days, two things are guaranteed to be waiting on your desk; a two foot stack of mail and hundreds and hundreds of emails.

The average person just doesn't want to deal with these piles any longer than absolutely necessary. Your buyer will buzz through these stacks ruthlessly culling and tossing just to remove the clutter. They'll spend mere seconds on each piece of mail.

## Do You Have a Lead Card/Form?

Make sure you record the following in your own manual lead card from booth visitors and conference contacts:

- ⇒ Title
- ⇒ Buying Influence
- ⇒ Budget
- ⇒ Interest
- ⇒ Time Frame
- ⇒ Additional information they offered or promises staff made.

**- Barry Siskind**

International Training & Management

Frankly, I don't want my expensive follow-up package to be in that pile. That's why I developed what I call the Forty-Eight-Hour-Rule of Trade Show Sales Lead Follow-Up.

### **The Forty-Eight-Hour Rule of Follow-Up**

is simple by design and, an effective way of reaching the prospect in a timely fashion. The goal of the rule for the follow-up package to arrive no earlier than two working days after the show ends, and no later than fortyeight- hours after that. Think of it as a fortyeight- hour "window." Why?

- ⇒ **Visibility.** You don't land in the big pile of mail. When your materials arrives, the clutter "while you were gone" pile has been cleared.
- ⇒ **Memory.** The show is still fresh in the prospect's mind. If you develop a good rapport with them they'll remember you and your product line.
- ⇒ **Creditability.** You told the prospect you'll be sending the information out right away, and now you've done it. You anchored in the prospects mind just how professional and dependable you are, and established that you can deliver as promised.

### **Follow Through on Follow-Ups**

Five working days after the show closes, your packet of information should be in the hands of the prospect. Call and ask if they received the information requested. Be sure and emphasize that you promised to send it to them.

Politely ask if they had a chance to look at it. If they have, then ask to set up a phone appointment later to discuss how you might work together.

The request for a phone appointment is very important. Don't assume that just because you've gotten them on the line, they have time to talk to you now.

Be considerate and offer to speak with them at their convenience. The appointment also underscores that what you'll be talking about is important.

If they haven't looked it over yet, then confidently say that you'll follow-up in a week to answer any questions they have. This will put the onus on them to look through the package. Again, set the phone appointment, to give it immediacy.

### **The 5/10/20/40 Follow-Up**

You start the 5/10/20/40/ Follow-Up System with your call to the prospect five days after the show. You continue at ten, twenty, and forty days after the show. With calls at regular intervals you have a plan for real sales progress.

Of course, if you close the deal on the second call, then you're better than most. But good salespeople know it takes time. If they are going to buy, it'll be from the one who stays in the game long enough to win.

### **Get Leads on New Leads**

One more objective is to get the name of another possible contact from the prospect. After meeting a prospect and following-up regularly, you usually build a good rapport with them. You can ask them to give you referrals, whether or not you do business together. In fact, sometime the ones that you don't work with feel a sense of obligation to help because of your relationship.

Remember, selling happens before, during, and after the show. With a timely and effective follow-up, you can take what used to be a two or a three day event and turn it into a campaign that brings returns for a long time to come.