

# Speaking topics

Bringing brand, marketing and mission insights to credit union audiences in 2024.

# Who we are

For mission-driven organizations like credit unions, system partners and fintech, striking the balance between impact and operations can be difficult.

Mission Brands focuses exclusively on delivering the customized marketing, communications and engagement experiences your mission and members deserve—as an auxiliary arm of your organization.

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# You're in good company

Mission Brands proudly partners with a number of credit union and cooperative finance organizations, including:



WORLDWIDE FOUNDATION  
for CREDIT UNIONS

# Meet the speakers

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## **Sam Plester, CUDE Founder & CEO**

Sam is a marketing and communications leader with two decades' experience across the UK and USA. He has held national leadership roles within the U.S. credit union movement, focusing on brand strategy, affinity marketing, and content strategy and development.



## **Mary Jane Connor Creative Director**

Mary Jane is a creative adventurer, whose primary goal in life is to do good work and have fun doing it. Mary Jane specializes in drawing out the insights and strategic vision to help organizations define a clear brand identity, and developing the creative systems that bring that brand to life.



## **Josh Kahle Growth Advisor**

Josh is an innovative product leader with experience building, running and leading a software company through acquisition. Josh's product management, business development, customer success and sales accumen, are helping drive Mission Brands Consulting's growth.



## **Karli Saner Marketing Strategist**

Karli is an experienced marketing leader, passionate about partnering with clients on innovative, content-driven strategic marketing. She has more than a decade of experience across finance, B2B tech and B2C industries, in start-ups and mature organizations.



## **Lenny Zaleski Social Media Specialist**

Lenny embodies the Gen Z mentality: He is digital-first, values-driven and committed to inacting and effecting change through strategic marketing. Lenny graduates from the University of Dayton in May 2025 with dual majors in Public Relations and Political Science.

# Individual presentations

Inspire your audience with mission-driven brand, marketing and creative strategy sessions that focus on credit union purpose, growth and sustainability.

# Keep purpose constant.

**Title:** **Keep purpose constant: How focusing on service over solutions can open more doors.**

**Audience:**

- Credit union, fintech, CUSO C-Suite
- Marketing leaders

**Description:** A deep-dive into brand strategy, development and execution, and how even the most innovative, disruptive organizations in the credit union system can infuse traditional credit union principles and purpose effectively, ensuring long-term growth and maximum impact on credit union members.

**Speaker:** Sam Plester, Mission Brands Consulting

**Key takeaways:**

- The core principles of a robust brand strategy
- A roadmap for aligning brand strategy to operations—and the red flags that they're not in-tandem
- How to activate your brand framework through people, products and purpose

# We'll CU Thrive: B2B marketing strategies for fintech and CUSOs.

**Title:** We'll CU Thrive: B2B marketing strategies for fintech and CUSOs.

**Audience:** Fintech/CUSO C-Suite, marketing leaders

**Description:** A deep-dive into credit union pain points, consumer trends and how CUSOs, fintechs, system partners etc. can most effectively position themselves to address them.

**Available speakers:**

- Sam Plester
- Mary Jane Connor

**Key takeaways:**

- Ways to segmentize credit union audiences and map the pain points your organization is best-suited to solve
- The critical nuances in your go-to-market strategy that will maximize engagement
- the Dos and Don'ts of marketing to a credit union audience

# 96% headroom: A deep dive into the untapped Gen Z market.

**Title:** 96% headroom: A deep dive into the untapped Gen Z market.

**Audience:**

- Credit union C-Suite
- Fintech, CUSO marketing leaders

**Description:** A focused exploration of the first truly digital-native cohort, their financial expectations, goals and behaviors.

Discover the marketing and engagement strategies credit unions can use to reach Gen Z directly, and how to partner effectively with fintech to complement those activities.

**Available speakers:**

- Sam Plester
- Lenny Zaleski

**Key takeaways:**

- A detailed understanding of the first digital-native generation, their priorities and financial expectations and behaviors
- Unique marketing programs to reach and engage Gen Z where they are
- How to avoid the same mistakes we made with Millennials



# Crafting connection: The vital role of brand and creative strategy.

**Title:** **Crafting connection: The vital role of brand and creative strategy.**

**Audience:**

- Credit union C-Suite
- Fintech, CUSO marketing leaders

**Description:** As neobanks, fintech lenders and other non-traditional FIs target the white and wealthy, the need for credit unions that represent and resonate with overlooked, underserved communities has never been greater.

Explore the critical importance of a brand strategy anchored in member discovery, local need and your credit union's fundamental mission, and how that can transform your community's financial health and support long-term growth.

**Speakers:**

- Sam Plester
- Mary Jane Connor

**Key takeaways:**

- Insights into developing a compelling brand narrative that resonates with your target market
- Strategies for leveraging creative development to differentiate your credit union
- Case studies on successful brand transformation and member engagement initiatives

# Mastering the market: Innovative marketing strategies for financial services.

**Title:** **Mastering the market: Innovative marketing strategies for financial services.**

**Audience:**

- Credit union marketers
- Fintech, CUSO leadership

**Description:** The digitization of financial services has forever changed consumer behaviors. For fintech, it means fighting for relevance and individuality. For credit unions, it means adopting new methodologies to attract, engage and retain a distracted, disrupted audience.

Delve into the latest trends, tools, and tactics that can deliver low-risk, high-reward returns for the financial services organizations willing to forge a new path.

**Available Speakers:**

- Sam Plester
- Josh Kahle
- Karli Saner

**Key takeaways:**

- An overview of current B2B, D2C marketing trends and innovations
- Practical strategies for integrating digital and traditional marketing efforts without disrupting your workflow
- Examples of successful marketing campaigns and lessons learned

# Automatic for the people: Marketing automation that drives community impact

**Title:** Automatic for the people: Marketing automation that drives community impact

**Audience:**

- Credit union C-Suite
- Fintech C-Suite

**Description:** AI and automation has forever changed consumer expectations and in-house processes, but many credit unions still believe it is out of reach for their organization.

This session will demystify AI and automation, delving into how marketing automation can be effectively integrated into credit union operations to personalize member experiences, drive growth and gather insights that fuel strategic decisions.

**Available Speakers:**

- Josh Kahle
- Sam Plester

**Key takeaways:**

- A solid understanding of marketing automation fundamentals
- Insights into selecting the right automation tools and practical tips on implementation
- Guidance on setting KPIs and measuring the effectiveness of marketing automation efforts to ensure continuous improvement and ROI

# Panel conversations

Are there talented, engaging individuals attending your event that you'd like to work with? Mission Brands can take on the production logistics, talent screening and preparatory work to deliver impactful panel conversations.

# The new tech-stack

**Title:** The new “Tech Stack”: Ecosystem opportunities for emerging fintech & CUSOs

**Audience:**

- Credit union C-Suite and decisionmakers
- Fintech/CUSO leadership

**Description:** While larger, more mature providers can deliver economies of scale, emerging fintech are establishing a new cooperative system, helping drive growth for them and their credit union customers.

Hear from industry leaders on how “stacking” strategically aligned and technologically compatible/complementary partners to serve credit unions is a win-win-win solution.

**Example panel:**

- Sam Plester, Mission Brands Consulting (Host)
- Payments fintech
- Compliance fintech
- Lending fintech

**Key takeaways:**

- Tangible growth opportunities for emerging CUSOs and fintech
- Risk assessment roadmap for credit unions looking to engage younger fintech
- How to leverage cooperation and compatibility as a marketing tool

# A rising tide: Supporting smaller credit unions as a strategic priority.

**Title:** A rising tide: Supporting smaller credit unions as a strategic priority.

**Audience:**

- Fintech/CUSO C-Suite
- Credit union marketing leaders

**Description:** The number of credit unions has declined almost 70% since the turn of the century, and while the larger organizations have continued to grow through this period, the vast majority remain less than \$300M in assets.

Discover how prioritizing \$100M+ credit unions can help grow your fintech/CUSO, support the broader credit union system, and drive greater financial wellness across the nation.

**Example panel:**

- Sam Plester, Mission Brands Consulting (Host)
- Digital account opening fintech
- Small CU community leader
- Trade association leader / regulator

**Key takeaways:**

- The critical pain points for smaller credit unions
- How to break through the credit union wall and establish growth-aligned partnerships
- Opportunities for scale

# The psychology of finance.

**Title:** **The psychology of finance: Understanding individuality and its influence on financial behaviors .**

**Audience:**

- Credit union CEOs, CLOs
- Financial coaches or wellness staff

**Description:** There's little in life more personal than our finances and how we perceive and manage them, but traditional financial coaching programs can approach unique moments with generalized solutions.

Discover a deeper understanding of an individual's consumer behaviors, how that data can augment financial coaching and wellness programs, and how to operationalize learnings to grow your credit union.

**Example panel:**

- Sam Plester, Mission Brands Consulting (Host)
- Financial wellness fintech
- Financial behavioral psychologist
- Credit union financial wellness leader

**Key takeaways:**

- A deeper understanding of how culture and individuality can influence consumer financial behaviors
- How to enhance your membership experience and increase financial wellness
- How to integrate and operationalize behavioral data to maximize lending

Our mission is to  
elevate and amplify  
**socially minded**  
brands, creating  
greater awareness of  
**better solutions** for  
more people.

**Mission Brands Consulting**

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