

DRIVE SALES

Lasting Impressions works with companies to transform their great ideas into brilliant corporate gifts and sales tools to deepen client relationships, drive revenue and generate referrals.

CASE STUDY: INTEGRATED MARKETING CAMPAIGN



Umpqua Bank is a community bank headquartered in Roseburg, Oregon with branch locations spanning three states. This campaign was focused in the Seattle market.

OBJECTIVE

Lasting Impressions consulted with Umpqua Bank to design an integrated collection of sales tools targeted at new customers with the end goal of increasing Umpqua Bank's share of wallet with their target audience.

The catalyst was Umpqua Bank's access to third party research from the banking industry demonstrating new customers are most likely to move additional assets within the first nine months of becoming a Bank customer. Umpqua Bank had an existing 90 day program for welcoming new customers, but believed there would be strong benefits in converting additional assets to the bank if a strategic plan was implemented to target new customers for a full nine months.

In creating our strategy, we agreed upon the following business principles:

- At any given time, approximately 10-15% of the Bank's database (including existing customers, prospects and referral partners) are in a position to invest or refer services.
- It is important to stay in consistent communication with the Bank's database so that when customers are ready to invest, Umpqua Bank is positioned to serve them.
- Consistent communication with customers leads to lifetime relationships, repeat business and referrals.
- 20% of Umpqua Bank's customers generate 80% of the bank's revenue.

PROJECT SCOPE

Design sales tools that capitalize on Umpqua Bank's position in the banking industry. Example: "With FREE coffee, internet access and cookie Friday's - Umpqua Bank is the perfect place for customers to relax and enjoy themselves." Umpqua Bank believed that if we could find creative ways to consistently invite customers and prospects to the Bank, relationships would be created leading to additional assets for the Bank.

GOALS

- Leverage "Sip | Surf | Read," an existing Umpqua Bank marketing campaign, to tell the Bank's story.
- Position Umpqua Bank representatives as Trusted Advisors.
- Develop a package which included an item of value and coordinated collateral that Bank representatives could physically drop off for members of the target database (or mail and follow up with a phone call.)

The package would invite customers into the store and create an opportunity to:

- Earn new business (Prospects)
- Cross sell by expanding investment commitments (Existing Customers)
- Acquire referrals (Customers, Referral Partners, Prospects)

RESULTS

In the first six months of the campaign, Umpqua Bank increased their investment portfolio 48 fold.

Continue to the next page for to see the campaign

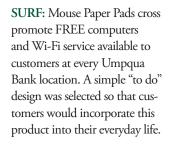


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DRIVE SALES — THE CAMPAIGN

SIP: This 16 oz. acrylic tumbler with hot & cold lid was selected as the "Sip" component to capitalize on Umpqua Bank's existing practice of giving away Umpqua Bank branded coffee.









Liud you now that when you carrie with its you can trum a notifier erand frith a treat for yousself? You can! Come wist our (Cate, sip our signature cottee, sur one of our dedicated computiers and refalst with you read in the comfort of our store. On Friday's we have FREE cookies. And any day of the week you come, you are welcome to redeem this card for a FREE bag of signature Umpqua blend cottee as our gift to you. Come experience what it's like to bank like you live. Live well at Umpqua Bank.







computer access where you can read, surf and sip a cup of coffee? Now you can turn a routine errand into a **special treat** for yourself. A **con-venient** place to visit, meet with friends and get you banking done. As our special gift for stopping by, be sure to turn this card in for a FREE bag of signature Umpqua blend coffee on your next visit

Come see us soon and see what it's like to bank like you live. Live well at Umpqua Bank!





READ: The foundation of this campaign was Umpqua Bank's deep desire to position themselves with customers and the community as a "friend." Given this goal, Lasting Impressions transformed the inspirational book entitled "Friend" into a signature product by designing a custom book jacket showcasing the Umpqua Bank wall mural featured in most bank locations.







