

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

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.



SURF: Mouse Paper Pads cross promote FREE computers and Wi-Fi service available to customers at every Umpqua Bank location. A simple “to do” design was selected so that customers would incorporate this product into their everyday life.



Let's Do Coffee!

Your friends at Umpqua Bank invite you to **come for coffee**. If you have time, stay awhile and let's visit. We'd like the opportunity to get to know you better and become **your trusted advisor**.

Did you know that when you bank with us you can turn a routine errand into a treat for yourself? You can! Come visit our iCafe, **sip** our signature coffee, **surf** one of our dedicated computers and **relax** while 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 coffee as our gift to you. Come experience what it's like to bank like you live. **Live well at Umpqua Bank.**

sip surf read



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Catch the Wave and Surf with Us

Did you know, Umpqua Bank iCafes offer FREE 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 **convenient** place to visit, meet with friends and get your 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!**

sip surf read



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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.



You will always have a friend at Umpqua Bank.

We think a friend is someone you enjoy getting to know better. A person you consider spending time with - time well spent. **A trusted advisor.**

We invite you to come to our iCafe and turn a routine errand into an unexpected delight. A place where you always feel welcome and surrounded by **friends**. When you stop by, be sure to redeem this card for a FREE bag of signature Umpqua blend coffee.

Visit us today and see what it's like to bank like you live. **Live well at Umpqua Bank!**

sip surf read



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Want the same results? To establish a strong partnership that will lead to creative sales strategies like this contact Lasting Impressions at 425.822.6651 or visit LastingImpressionsGifts.net.