

BRAND VOICE



RIGHT BRAIN

VISUAL IDENTITY



RIGHT BRAIN

TARGET AUDIENCE

A Power Elite

The wealthiest households in the US, living in the most exclusive neighborhoods, and enjoying all that life has to offer

6.30% | 7.99%



Key features

- Wealthy
- Highly educated
- Politically conservative
- Well-invested
- Charitable giving
- Active and fit



V Boomers

Middle class baby boomer-age couples living comfortable lifestyles settled in suburban homes

4.68% | 6.50%



Key features

- Middle class
- Suburban
- Politically independent
- Nature enthusiasts
- Married couples
- 80s/70s music lover



I Family Union

Middle income, middle-aged families living in homes supported by solid blue-collar occupations

5.14% | 6.56%



Key features

- Bilingual
- Married with kids
- Large households
- Financially cautious
- Team sports
- Blue-collar jobs



Who we are

Head of household age	Type of property
36-45	Single family
188 29.1%	104 56.1%
Est. Household Income	Household size
\$50,000-\$74,999	2 persons
148 29.7%	108 29.8%
Home ownership	Age of children
Homeowner	13-18
106 85.9%	258 32.9%

Channel preference

91	68	118
66	22	129

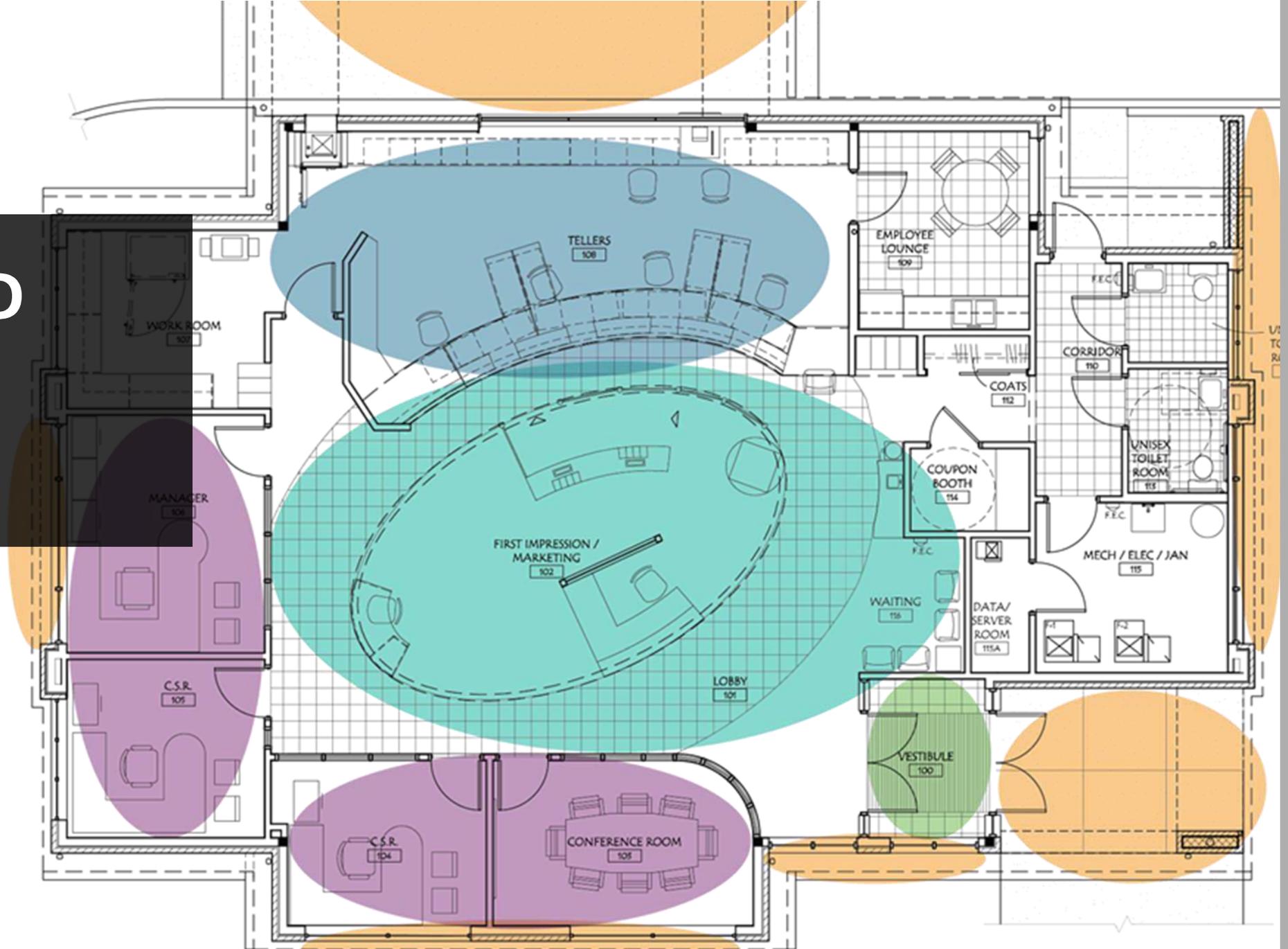
Technology adoption



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ESTABLISHED ZONES:

Infusing creativity



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BRANCH DESIGN

Ensure your branch design reflects your brand identity from the outside in.

VISUAL ELEMENTS

Develop a consistent visual language including logos, colors, imagery, etc.



MEMBER SERVICE

Train your employees to deliver exceptional member service that aligns with your brand values.

TARGET MESSAGING

Ensure your message is consistent across all channels.

BRANCH DESIGN



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VISUAL ELEMENTS



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MEMBER SERVICE

RIGHT BRAIN

**TARGET
MARKETING**

Take
your
dreams
to the
bank.™



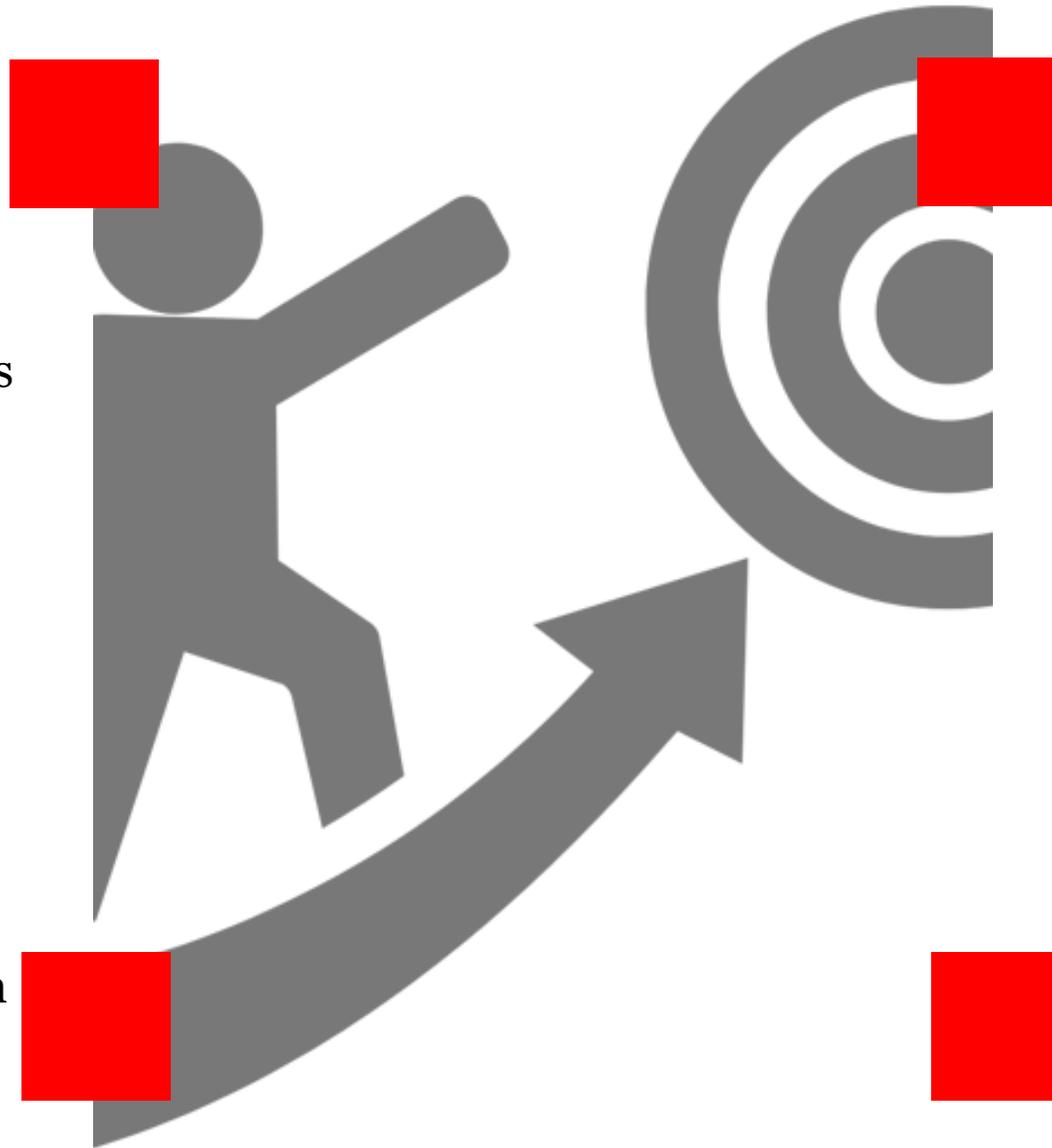
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BRAND AWARENESS

Track your brand awareness through surveys, social media monitoring, etc.

EMPLOYEE ENGAGEMENT

Monitor employee engagement and satisfaction to ensure they are aligned with your brand values.



BRANCH PERFORMANCE

Measure key performance indicators to ensure branch is performing as expected.

MEMBER SATISFACTION

Regularly collect feedback from members to ensure you are meeting their needs and expectations.

BRAND AWARENESS



SOCIAL MEDIA REACH
AND EASILY SHARED
CONTENT



BRAND MENTIONS
AND ARE PEOPLE
TALKING ABOUT
YOU?



SURVEYS AND
QUESTIONNAIRES,
ASKING FOR FEEDBACK



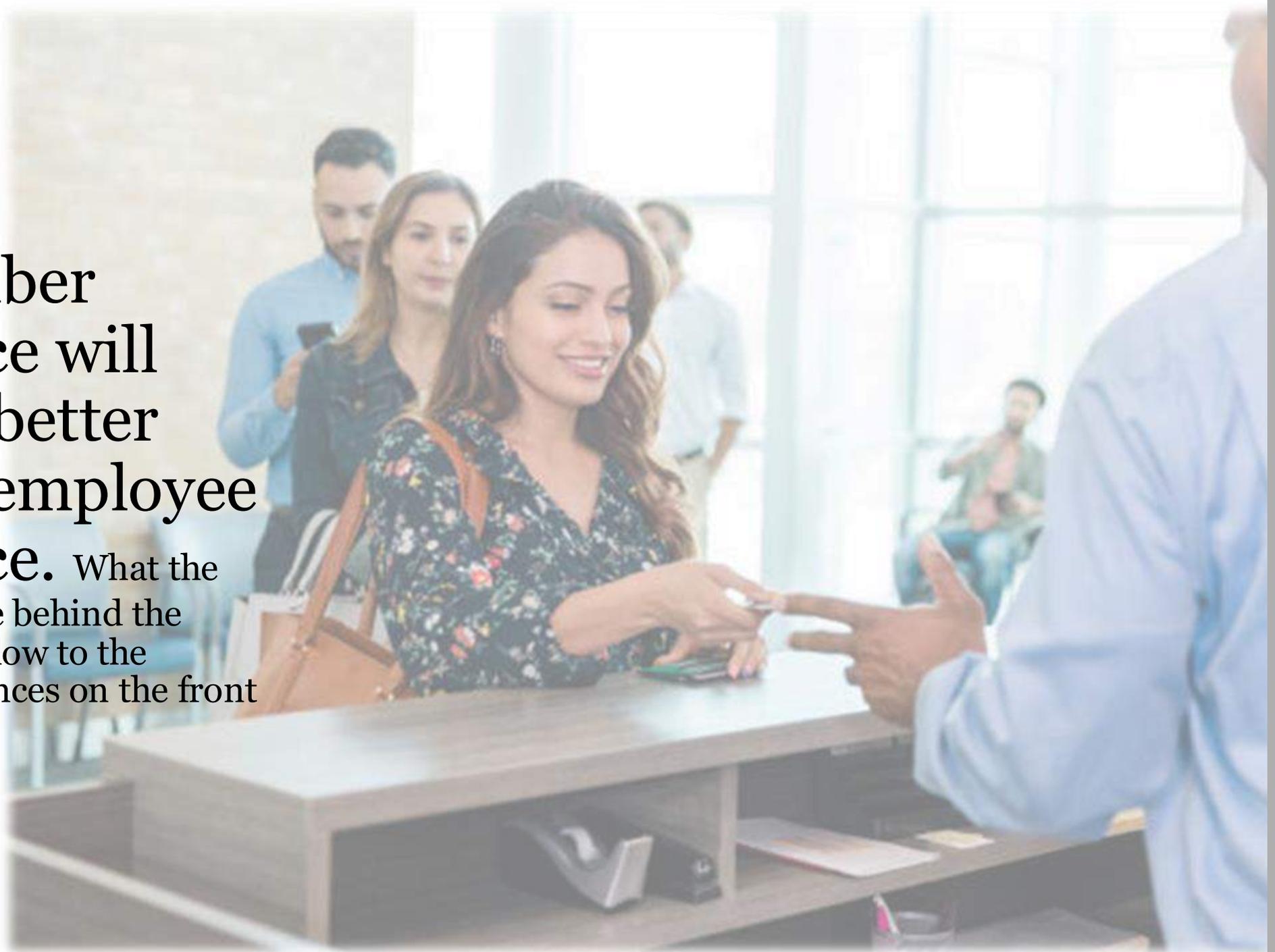
USE ONLINE TOOLS
FOR TRACKING



EMPLOYEE ENGAGEMENT

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The member experience will never be better than the employee experience. What the culture looks like behind the scenes will overflow to the member experiences on the front lines.



BRANCH PERFORMANCE



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MEMBER SATISFACTION

$$P\% - D\% =$$

NPS



CASE STUDY: REFRESH INCREASES NPS 80%



BEFORE

- Dated branch with underutilized space, awkward flow, limited technology
- Surveyed consumers on space, facilities, experience, and NPS “recommend/refer” question

NPS OF 37 PRE-REFRESH

CASE STUDY: REFRESH INCREASES NPS 80%



AFTER

- Branded environment with fresh design including paint, flooring, lighting, graphics, furniture, and strategic use of technology
- Surveyed consumers on space and NPS “recommend/refer” question

NPS OF 66 POST-REFRESH

CASE STUDY: ADDITIONAL DATA

Methodology: in-person, paper surveys of consumers in branch before and after the Refresh project with rated scale (0 – 10) questions plus open field for additional comments. Data in addition to NPS scoring.

Question	Response Average – Before	Response Average – After
How satisfied are you with the overall banking experience currently at FI?	6.66	9.03
How satisfied are you with the cleanliness, comfort, and overall look of our branch facilities?	6.00	9.20
FI is more professional and trustworthy than other banks in the community.	7.00	9.01
FI offers the best banking experience in my community.	7.00	9.04
How likely are you to do business with FI in the future?	7.00	9.11

PULLING IT TOGETHER



Left brain thinking involves logical and analytical processes such as planning, organization, and problem-solving.



Right brain thinking focuses on creativity, intuition, and visual aesthetics to bring innovative ideas and concepts to life.



Combining left and right brain thinking allows for a holistic approach that balances practicality with artistic expression, resulting in well-rounded and successful projects.

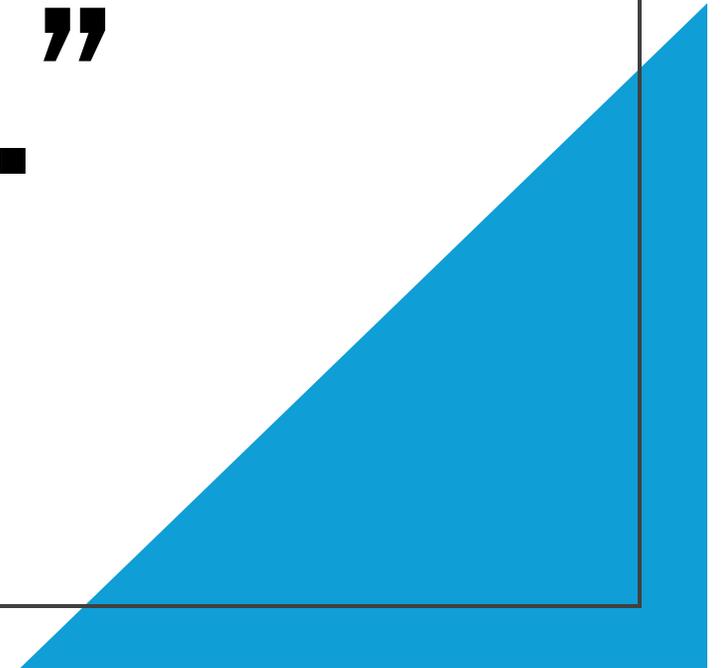


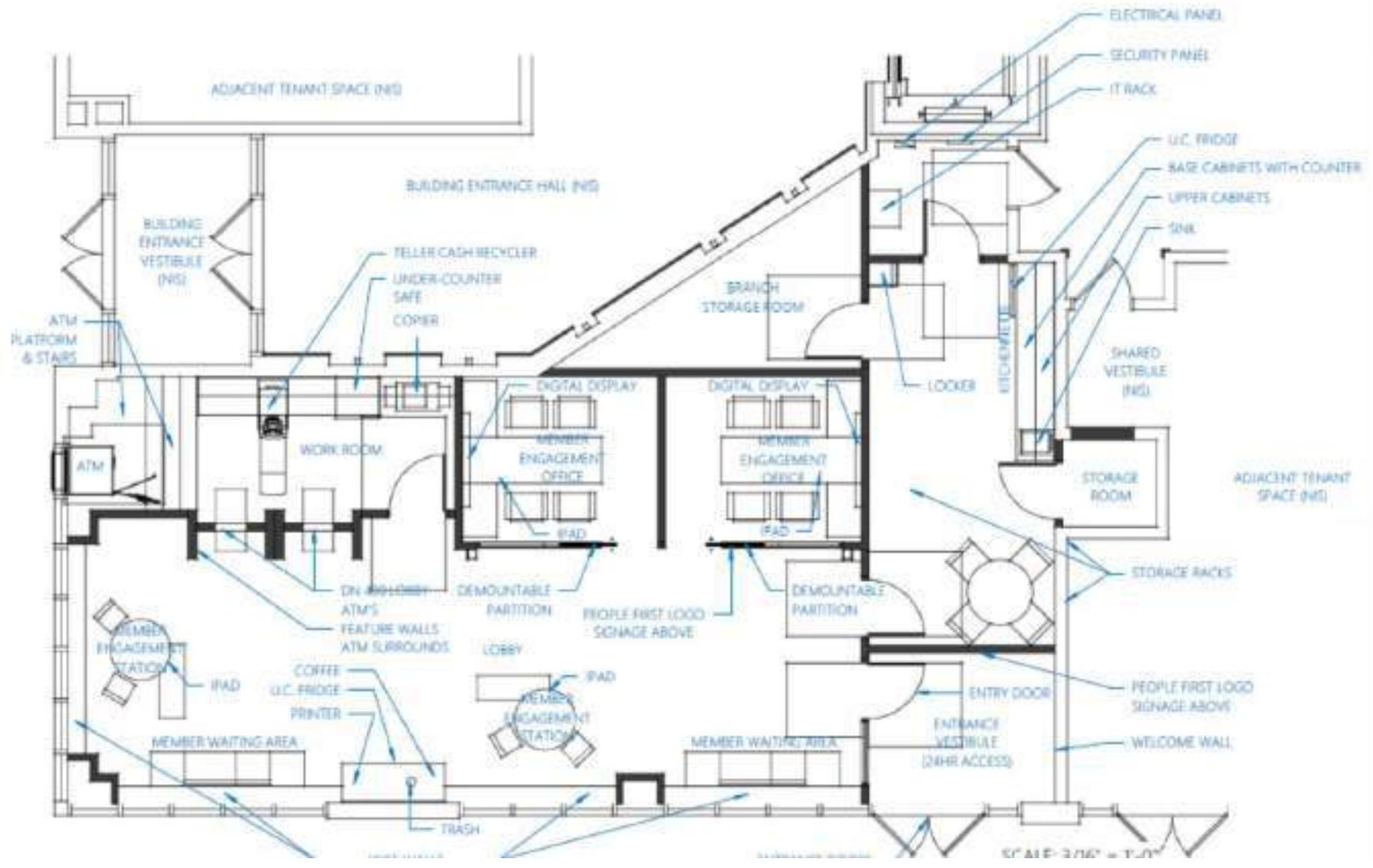
Leveraging both sides of the brain can lead to more efficient problem-solving, enhanced communication, and a deeper understanding of user needs and preferences.

CASE STUDY –

“I DO, WE DO, YOU DO.”

Evolving the branch experience to solve the physical and emotional needs of today's consumer.













SUMMARY

1. A balanced approach is critical for successful design-build and branch transformation processes.
2. Understanding the complementary roles of analytical and creative thinking is essential.
3. The successful integration of both analytical and creative thinking leads to improved outcomes in design-build projects, enhancing client satisfaction, operational efficiency, and the overall branch experience.



THANK YOU

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