

# Case Study – Overflow Marketing Support



First Place Bank is a Midwest regional bank with 62 locations. The Marketing EVP partnered with 3X Marketing to provide overflow support when the workload becomes excessive or requires a senior-level marketing expertise.

← Shareholder Powerpoint

Contact Strategy

## Strategic Mergers & Acquisitions

- Our strategic growth philosophy is focused on organic growth supplemented by disciplined acquisitions.
- The current management team has been involved with the Company's major acquisitions and ensuing integrations over recent years.
- Management's experience will be instrumental when considering whether bank or FDIC assisted acquisition opportunities arising within our footprint.



### Most Wanted Contact Strategy

Program Goal: Build a relationship with key prospects through ongoing, proactive contact.

**Direct Mail Meeting Program**  
 2010: 1st time since April, September, October

**Step 1: Add Personalized Content Direct Mail**  
 Add contact information (company name, contact name, full address, 000000 cards) to marketing envelope. This will let you know the size your mailers were sent.

**Step 2: Follow Up Business Development Outreach**  
 Add mailer to email list a few days and follow-up with a phone call to the recipient. The goal is to create a back-to-back meeting.

**Step 3: Face-to-Face Meeting Opportunity**  
 Using the direct mail, engage business (new) and/or "hot" leads research the latest news in the area of the client's website. Familiarize yourself with client's current projects. Try to get to attend with you. Use the client and educate attendees on the value of building a relationship.

**For Further Information:**  
 Debra A. Bluh, CEO | 3X Marketing  
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October 28, 2010

## 2010 ANNUAL SHAREHOLDERS' MEETING

Steven R. Lewis, President & CEO

### Noninterest Income



### Performance Highlights

- Increased loan officers by 33 in past 12 months.
- Favorable rate environment
- Mortgage banking gains for 1 & 11 at an all-time high

- Service charges and fees
- Electronic banking fees
- Change in fair value of trading sec.

### Social Media Guidelines

Effective December 1, 2010

Notice: This document supports existing company policies and is not intended to supersede them.

**Introduction:**  
 Our business begins with a conversation. With the increased use of social media, many of those conversations are occurring online. First Place Bank recognizes the importance of participating in these online conversations and is committed to participating in online social media the right way. These Social Media Guidelines have been developed to help employer-employees to participate in the new frontier of marketing and communications.

**The Value of Social Media:**  
 Social media is based on the concept of community... just like belonging to various community organizations to connect with people in our communities, social media is similar. It gives you the ability to network, build relationships, write potentially helping people with financial services along the way. The power of social media is that unlike community events, social media is accessible 24 hours a day, seven days a week.

**Social Media Guidelines:**  
 Definition: Social Media for the purpose of this overview is considered to be Blogs, Facebook, Twitter and LinkedIn. YouTube and other social media related tools are not included in this definition of social media and are prohibited.

**Access:** Employees will be given access to Facebook, Twitter and LinkedIn websites using company equipment.

**Utilization:** During business hours, employees can utilize Facebook, Twitter and/or LinkedIn to engage in conversations that are business related.

**Periodically,** marketing may send social media communication alerts to the organization through email. Employees are not required to use social media or purchase suggested messages.

**Rules:** There's a big difference in speaking "on behalf of First Place Bank" and speaking "about" the First Place Bank. These rules apply for both official and unofficial or personal, online activities where you might refer to First Place Bank. All organizational policies that regulate on-duty conduct apply to social media activity, including but not limited to policies related to legal harassment, code of conduct, nondiscrimination, and protecting confidential and/or proprietary information.

- First Place Bank reserves the right to monitor employee use of social media regardless of location (i.e. at work on a company computer or on personal time with a home computer).
- First Place Bank policies of anti-harassment, ethics and company loyalty extend to all forms of communication (including social media) both inside and outside the workplace. You are responsible for what you write.
- First Place Bank policies that include protecting confidential or proprietary information apply to all forms of communication including social media.

↑ Social Media Policy

Business Spotlight Kiosks →

The kiosks display various business spotlights, including one for C/B Associates and another for First Place Bank. A woman in a striped shirt stands between the kiosks.

### Draft Press Releases

Second Graders Send Thanks to Soldiers

...The school year may have been winding down but these second graders decided to take on a new challenge. Students participated in the National Care Campaign by writing letters, drawing pictures and including in the care packages that will be sent to soldiers.

...Mrs. Stacey Harris limits class behind," explained Debra Bluh, EVP Bank. She continued, "Getting a message of 'thanks' from a child (that's) heartless is appreciated by all ages."

Effective drive through June 6 to collect care packages the local... the other needed for each soldier. Another has been at...

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