



**wba**<sup>TM</sup>  
WESTERN BANKERS ASSOCIATION

# Endorsed Partner Toolkit

A Guide For Prospective Endorsed Partners  
of the Western Bankers Association



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# WBA Endorsed Partners Process Introduction

Thank you for your interest in becoming an Endorsed Partner with the WesternBankers Association. Our members have valued and appreciated the level of integrity associated with our Endorsed Partner process for more than 127 years. They also rely on the quality of our due diligence and focus on providing innovative resources for our members.

Our Endorsed Partner value proposition is to provide you with the assistance you need to increase awareness of your services and connection with bankers across the west. This toolkit is designed to help you with your Endorsed Partner application.

The following pages will outline the process for becoming a WBA Endorsed Partner. It is important for you to be informed about the opportunities and responsibilities of our partnership as well as the commitment both of us share. Membership is a prerequisite for application to the Endorsed Partner program. As a member you will benefit from discounts on WBA programs and provide insight to the potential value of our partnership.

The Banker Benefits Board of Directors is directly involved in the selection and approval of our Endorsed Partners. Once you have completed the application, the proposal will be submitted to the Banker Benefits Board and then for approval to the WBA Board of Directors.

We invite your participation in the Endorsed Partner approval process and look forward to welcoming you to the WBA Endorsed Partner family!

Sincerely,

Julianna Graham  
SVP Strategic Partners  
Western Bankers Association



## Endorsed Partner Relationship Benefits

We believe that becoming an Endorsed Partner with the Western Bankers Association is a strategic marketing and sales differentiator for bank product and services providers across our footprint. As an Endorsed Partner you will benefit from our close relationship with our members and our proactive approach to your marketing and sales efforts.

### TRUSTED ADVISOR

As a potential Endorsed Partner you will experience a rigorous due diligence process and product review culminating in WBA board approval. Our comprehensive due diligence process follows FFIEC guidelines for third-party vendor approval. This process provides our members and your potential customers a high level of comfort in initiating and pursuing a potential relationship with your company.

### MARKETING CHAMPION

As an Endorsed Partner, we will consult with you on a strategic, coordinated and comprehensive marketing plan that will include:

- **Program Launch Consulting:** We will meet with your sales and marketing team to design a complete marketing launch campaign and timeline as a new WBA Endorsed Partner that meets your particular needs.
- **License/Branding:** Use of the WBA Endorsed Partner logo on your marketing materials.
- **Website:** Endorsed Partner listing, spotlights, promotion of white papers, etc.
- **Sponsorship and Exhibiting:** Priority consulting on sponsoring events for maximum exposure, premium marketplace booth location, discounted registration, etc.
- **Articles:** Priority selection for topics by your subject matter experts in WBA publications.

- **WBA Annual Endorsed Partner Directory:** Noted placement and potential for expanded listing in our annual member resource guide.
- **Professional Development Speaking Opportunities:** Priority consideration for subject matter experts to speak at WBA professional development programs.
- **Sales Support:** Regularly scheduled sales pipeline meetings to review prospects and outreach opportunities.
- **Member Events:** Join targeted member events that provide a unique opportunity to demonstrate your products benefits and features.
- **Email Campaigns:** Targeted email campaigns designed to provide information for your targeted audience.
- **Webinars:** Opportunity, as appropriate, to host timely subject matter webinars that inform our members on upcoming issues related to their needs.
- **Referrals:** In support of your direct sales efforts we will provide direct calls to prospects identified in our pipeline call reviews.
- **Annual Report Card:** Annual review of marketing plan activities annually.

## Endorsed Partner Commitment

After completing the Endorsed Partner approval process, we will work together to develop a custom designed program and agreement that fits your particular needs. Your active participation, support and involvement with the WBA are critical to our mutual success.

**Our partner agreement includes but is not limited to the following contract partner elements:**

- **WBA Member Discounts:** Products and services offered must include terms, prices and conditions that are advantageous to WBA members and not be available to non WBA members.
- **Terms:** Two years with automatic annual renewal options.
- **Fees include:**
  - Membership
  - WBA Brand Royalty
  - Marketing
  - Sales Commissions on Sold Products
  - Sponsorship/Exhibiting
- **Sales Support:** In market, sales representation sales pipeline and prospect reporting capability.

# Application Process Overview





## Endorsed Partner Marketing Plan

The following program is the recommended marketing plan for the first year of endorsement. Please note that this is a generic sample.

The marketing plan may be tailored in order to meet specific needs of companies. It is designed to ensure that endorsed partners fully benefit from all the marketing outlets available to them through a WBA endorsement.

### ROLLOUT MONTH

- Announcement of partnership in targeted email to membership by WBA SVP of Strategic Partnerships and including company marketing material, if applicable.
- Email announcement in Inside Weekly e-newsletter.
- New partner information and logo added to website.
- Announcement of endorsement developed for the other WBA publications.
- Announcement shared via WBA's Twitter and LinkedIn social media profiles.

### MONTH TWO

- Spotlight feature on WBA's "Endorsed Partner Spotlight" webpage for up to three months.

### MONTH THREE

- Consideration of one-page article submission in next available Western Banker magazine. (After the initial feature, endorsed partners may be featured about once every 15-18 months.)

### MONTH FOUR

- Conference call with partner to evaluate progress.
- Email blast to targeted audiences, as appropriate.

### MONTH SIX

- Mass mailing sent to member banks with partner marketing materials.

### UPON RELEASE (ANNUALLY)

- Partner included in WBA Endorsed Partner annual catalog.

### ONGOING:

- Quarterly sales pipeline meetings with targeted list of banks and contacts, joint visits with WBA and planning for sponsor/exhibitor opportunities.
- Discounted advertising rates for Western Banker magazine.
- Two mailings or email blasts annually continue to be available to endorsed partners through life of contract.
- Unlimited postings or uploads of collateral and links on company's endorsed partner profile page on WBA's website.



## Annual Opportunities

Premium booth space in the conference marketplace is available to all endorsed partners who exhibit at WBA professional development programs. Our full suite of programs offer great sponsorship exposure and networking opportunities.

### JANUARY:

#### **Bank Presidents Seminar**

An exclusive two-day program attended by California and the west's most senior bank leaders.

### MARCH:

#### **Annual Conference**

A four-day event focused on guiding bank executives through the industry's greatest challenges to achieve short- and long-term initiatives.

## **MAY:**

### **Annual Women in Banking Forum**

Designed to inspire and empower women bankers, CBA's Women in Banking Forum draws more than 100 women banking executives and industry leaders from across California.

### **Emerging Leaders Conference**

This three-day program is centered around education, leadership and collaboration opportunities for the industry's rising stars.

## **SEPTEMBER:**

### **Education Summit & Expo**

A four-day program with more than 50 sessions across multiple tracks delivering the most current industry information and a showcase of product innovation.

## **OCTOBER:**

### **Annual Bank Counsel Seminar & Regulatory Compliance Conference**

This conference attracts nearly 300 BSA officers, compliance officers and attorneys representing our members who gather each year to discuss the latest regulatory changes and compliance issues, and look for the best products and services available for their institution.

## **NOVEMBER:**

### **Annual Directors Conference**

A two-day forum exploring topics in governance, regulatory changes, financial growth and other relevant issues.



## Endorsed Partner Questionnaire

**Please complete the following in its entirety.  
Please provide requested information via scanned or PDF files.**

- 1.** Please provide history, description and financial disclosure of your company, including but not limited to:
  - a. Corporate structure, name of parent organization, subsidiaries and affiliates
  - b. Corporate officers
  - c. Majority shareholders
  - d. Current balance sheet and income statement
  - e. Most recent fiscal year end financials

- 2.** Provide location of corporate headquarters and California offices and staff listing.

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- 3.** Provide complete description of the product or service you provide to banks.

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**4.** Describe how your product or service is implemented within a bank. Include average timeline.

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**5.** Describe how your product can benefit a bank.

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**6.** Describe your ideal customer profile, as well as asset size, number of employees, locations, etc.

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**7.** How are your services priced? Can you provide potential cost savings to WBA members? Please describe special pricing or introductory offer to WBA members.

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**8.** Is the service or product competitive with others in the industry in quality and price? Who are your competitors in California and the western region?

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**9.** How many California banks do you currently serve? How many banks in other states?

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**10.** Please provide up to six bank references that currently use your product or service. Please to include: name of bank, city, contact names, phone numbers and email addresses.

A. \_\_\_\_\_

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B. \_\_\_\_\_

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C. \_\_\_\_\_

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D. \_\_\_\_\_

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E. \_\_\_\_\_

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F. \_\_\_\_\_

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**11.** Please list all banking associations which have endorsed your services. Have you ever been turned down by a state banking association for an endorsed partnership or withdrawn an application?

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**12.** What market share do you have in the western region?

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**17.** Does your product implementation affect a bank's risk profile? What level of risk does it have to banks operationally? Please outline potential risks for WBA members and their directors or employees.

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**13.** What are your marketing expectations of the WBA? Detail the assistance you expect to receive from the WBA as part of your partnering agreement.

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**14.** How is your marketing department structured to support our partnership? Please include the number and the names and contacts.

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**15.** Please provide projections on the number of new relationships and expected sales revenues you expect as a result of our partnership.

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**16.** What would you include in a shared sales commission structure? How would you calculate it?

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**18.** Are you willing to make the financial commitment required in the endorsed partner agreement to include minimums in the following areas:

- a. Membership
- b. Royalties
- c. Sales commission
- d. Marketing
- e. Sponsorship/Exhibiting

**19.** What independent audits/reviews applicable to your services have been completed on your company? (i.e. SAS70 Type 11, FFIEC, Penetration testing, ITIL, etc.)

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**20.** What are your expectations of the WBA?

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