Fast+ Furious

October 17, 2013
Fast + Furious + Fun

- Stefanie Arck, Opportunity Finance Network: Social Media in Five Minutes a Day
- Demetric Duckett, TruFund: Crisis Communications Readiness
- Andrew Schultz, Garfield Group: Responsive Web Design
- Steve Varnum, NH Community Loan Fund: Tell Me a Story!
- Sherry Simmons, NCCLF: Be Bold with your Marketing
- Nick Burstein, Opportunity Finance Network: Designs That Scale
- Allison Starkey, Wells Fargo: How to be an Effective Co-Brand Partner
Social Media in 5 Minutes a Day

Stefanie Arck, OFN
October 17, 2013
The Power of Social Media

- It produces almost double the leads of trade shows, telemarketing, direct mail, or PPC.*
- 27% of U.S. internet time spent on social networking sites. **
- 34% of marketers have generated leads using Twitter***
- Facebook has 60%+ penetration. Twitter is at 35% BUT it’s the fastest growing network (more than a 40% increase over the last 9 months.****)
Variety is the Spice of Life

Different teams
Different structures
Different objectives

Do what makes sense for you
To Tweet is Sweet

★ B-to-B audience
★ Good for reputation- and relationship-building
★ Stats, articles, news
★ Tweet sheet:
  - Follow relevant #s
  - Build a list/follow a list
  - RT from OFN’s CDFI list
  - Thx & #FFs are warm & fuzzy
  - Tweet 3xs day: 1 promotion, 1 article, 1 piece of news (from someone)
  - Evergreen tweets for slow news days
Facebook is Worth a Look

- Consumer audience
- Great for pictures, stories, friendlier content (new staff, clients did X, y, or z)
- Post 3-4 times a week
- Like & comment on others’ posts--shows you’re paying attention
LinkedIn

- B-to-B audience
- Helps build your personal professional profile
- Build your company page
- Create a group if you have something to say/are a thought-leader
- Great for recruiting/connecting
Others

- Youtube—video-contingent (but what a great asset!)
- Pinterest—image-contingent
- Google + hangouts may be best feature
- Instagram—good image-contingent
- Bitly—don’t use long links!
- Hootsuite—helpful for advance posting (like when you’re at the #OFNConf!)
- Any others?
Crisis Communications Readiness

Demetric A. Duckett
TruFund Financial Services, Inc.
October 17, 2013
The Basics

★ Anticipate Crisis
  – Identify Communications Team
  – Train Spokespeople
  – Identify / Know Stakeholders (Internal & External)

★ When Lightning Strikes
  – Assess Situation
  – Acknowledge Truth & Possible Perceptions
  – Undertake Quick Action & Decisioning
The Basics

★ Getting Through The Storm
  – Create Clear Strategy / Think Long-Term
  – Establish Key Messaging & Talking Points
  – Engage Stakeholders (Internal & External)
  – Communicate With All (Friends & Foes)

★ Post Crisis
  – Postmortem Analysis & Learnings
  – Constantly Monitor
A Tale of Two Crises

★ Seedco found itself in trouble with the Feds!
  – Employee ignored, departs disgruntled & goes public
  – Newspapers pick up the story & scandal erupts
  – Denials all around
  – Investigations ensue & escalate
  – Loss of over $20 million in contracts
  – Indictments and a $1.7 million settlement
A Tale of Two Crises

Seedco’s woes meant crisis for Seedco Financial
- Management accompanied Seedco’s evolving situation
- Federal indictment was the major tipping point
- Name association & subsidiary status = MAJOR CRISIS!!!
- Partners grew concerned about public image
- Funders worried about financial impact
- Crisis management & communication was now critical
A Tale of Two Crises

★ Seedco Financial quickly moved to crisis mode
  – Convened management to determine strategic approach
  – Engaged expert vendors and consultants (Legal, PR, etc.)
  – Built comprehensive plan for damage control & recovery
  – Set wheels in motion for legal separation
  – Developed extensive stakeholder communications & outreach
  – Began complete renaming and rebranding process
  – Stayed the course, continuously assessing and refining
New Name. New Look. Same Mission!

More than a loan. An opportunity.

www.trufund.org
Responsive Web Design

Andrew Schultz \ Director, Digital Strategy \ Garfield Date, 2013
“Mobile was the final frontier in the access revolution. It has erased the digital divide. A mobile device is the internet for many people.”

- Susannah Fox, Pew Research
The lines between mobile and desktop have, and will continue to blur.
The Burning Question:

Is your website delivering an optimized experience?
Responsive Design is a methodology for creating websites that provide an optimized experience across many devices.
#GreatExample
Evolving our approach:
Think from the bottom up.
Atoms → Molecules → Organisms

MANY CDFIs → ONE PURPOSE
Atoms:
The building blocks of an interface — the digital evolution of brand guidelines
Fonts, Colors, Elements

Base CSS
Fundamental HTML elements styled and enhanced with extensible classes.

Typography

Headings
All HTML headings, \texttt{h1} through \texttt{h6}, are available.

Example

h1. Heading 1
h2. Heading 2
h3. Heading 3
h4. Heading 4
h5. Heading 5
h6. Heading 6

Body copy
Molecules:
Groups of atoms, bonded together – serving as the backbone of the system
Elements, Groupings, Layouts

Omnigraffle Stencils
We created a full set of sweet stencils to help you wireframe quicker.

How to Use Them
We took special care to make this set really complete to the features and UI elements available in Foundation. These can be installed as a stencil for Omnigraffle for Mac or used as a vector PDF in a program like Adobe Illustrator. You’ll cut hours off your wireframes without needing to create each element from scratch!

Check it out on the Playground →
Organisms:
Groups of molecules, working together – forming the larger picture
Available Templates

Click to view the templates in the browser. Press option/alt to download them for your next project.
When it all comes together:
We’ve just scratched the surface...

foundation.zurb.com
getbootstrap.com
garfieldgroup.com

(Shameless self promotion)
Tell me a story!

Steve Varnum
New Hampshire Community Loan Fund
October 17, 2013
Brainworms

Memory

Emotion

Language

Intellect

Imagination
“Once upon a time …”
The universal story

1. Let me tell you about _______________
2. She/he dreamed of _______________
3. But she/he couldn’t because _______________
4. And then _______________
5. And ever since then _______________
The universal story

1. Protagonist we care about (heroine)
2. The dream (goal)
3. The obstacle (problem to be solved)
4. The solution
5. Happily ever after (so far ...)
Good story

Not!

MANY CDFIs ONE PURPOSE

2013 OPPORTUNITY FINANCE NETWORK CONFERENCE
Impact on the people (or communities) we serve
Numbers numb

Jargon jars

Stories stick
Who needs your stories?

1. Public spokespersons
2. Grant writer
3. Communications/marketing
4. Web site
5. Evangelists (staff, board, supporters)
Where to find stories

★ Loan review documents and presentations
  – Look for “impact ripples” family > neighborhood > community

★ Post-loan data
  – Jobs created, families served, etc.
  – Do the results exceed the expectations?

★ Conversations with field staff
  – What projects are they jazzed about?

★ Social media (shhh, listen)
Hi Ron,

I wish to thank you so very, very much for all your help in making us homeowners once again! When we lost our home, we thought we would never be able to own our own place again.

My husband was so depressed as he held the burden of the loss of our home even though there was nothing we could do in the end!! I cannot explain how bad things were for us!

You were the answer to our prayers!! You helped us regain some dignity and a way of life that would allow us to be happy again! We love this area, this park, and our home!!!!!!!

So, thank you, my friend, for making my "golden years" golden!!!
Create your storytelling team

★ Collecting stories has to be part of their job
★ Include stories in new-hire orientation
  – Your CDFI’s birth story
  – Story of a project that illustrates your CDFI’s vision and mission
★ Start every staff and board meeting with a story
★ Get short “story synopses” of done deals from staff
★ Create a staff-accessible “story library”
Good teams have good coaches

- Who’s driving the bus?
- Conduct a storytelling workshop for staff
- Gentle critiques after staff, board meeting stories
- Regularly distribute or post good stories (don’t forget video!)
Story resources

- The Goodman Center, Andy Goodman
  - www.thegoodmancenter.com
- Book: Made to Stick, by Chip and Dan Heath
- Get Storied, Michael Margolis
  - www.getstoried.com
- Download: Stories Worth Telling, Capacity Waterloo Region (great resource lists)
  - www.capacitywr.ca/blogs/news/ournewstorytellingguide
Be Bold with your Marketing!

Sherry Simmons, Northern California Community Loan Fund
October 17, 2013
You gotta have a gimmick!!!
Cheering in the Tenderloin
Oh yeah!!!!!
MANY CDFIs
ONE PURPOSE

#OFNCONF
Adorable save the date

- These cute little houses were hand painted by the woman with red hair
- And distributed to everyone who attended the pre-event Kick Off
The Banner that was on our website

25 years 1987 - 2012
The creative art work used throughout
At the 25th Anniversary Event

★ The Photo Booth with some of our original founders!
The Opening Act at 25th Event

★ Without a net...but with many anxious Staff!
Part of our night’s entertainment
The Yellow Brick Road
Designs That Scale

Nick Burstein, Opportunity Finance Network
October 17, 2013
What is a logo?

★ A logo is a sign, symbol, trademark or badge which conveys the identity or ownership of a product, company, campaign, brand or concept in as memorable a way as possible.
Did you know?

Did you know? The word **brand** in regards to a company’s or organizations marketing comes from a literal brand used by furniture makers in the late 1700’s to inform the buyer of who made the product.
Great Brands are 3 things:

★ Simple/Clean

★ Versatile (Can work in multiple spaces effectively)

★ Eye catching! Must grab your eye immediately
## A memorable brand

<table>
<thead>
<tr>
<th>Year</th>
<th>Brand Image</th>
</tr>
</thead>
<tbody>
<tr>
<td>1898</td>
<td>[Image]</td>
</tr>
<tr>
<td>1905</td>
<td>[Image]</td>
</tr>
<tr>
<td>1906</td>
<td>[Image]</td>
</tr>
<tr>
<td>1940</td>
<td>[Image]</td>
</tr>
<tr>
<td>1950</td>
<td>[Image]</td>
</tr>
<tr>
<td>1962</td>
<td>[Image]</td>
</tr>
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<td>1973</td>
<td>[Image]</td>
</tr>
<tr>
<td>1991</td>
<td>[Image]</td>
</tr>
<tr>
<td>1998</td>
<td>[Image]</td>
</tr>
<tr>
<td>2003</td>
<td>[Image]</td>
</tr>
<tr>
<td></td>
<td>Current Logo</td>
</tr>
</tbody>
</table>
I thought he was talking about scale?
Scale can be tricky
MANY CDFIs
ONE PURPOSE
#OFNCONF

I DIDN'T HEAR YOUR QUESTION
BUT THE ANSWER IS ALIENS
Scale can be tricky

★ As we saw from the Nazca lines not all designs work in both large and small scales.

★ A great logo/design/brand MUST work in all sizes and be equally as effective.
Nick’s Fake CDFI (NEPCRLI)

Northeastern Philadelphia Community Redevelopment Landbank for Investment
Time to scale/Uh-oh!

Northeastern Philadelphia Community Redevelopment Landbank for Investment

MANY CDFIs ONE PURPOSE #OFNCONF
Let’s fix using the three great brand requirements!

Simple • Versatile • Eye Catching
Presto-chango!
Look at the versatility!
Thank you for your time!
How to be an Effective Co-Brand Partner

Allison M. Starkey, Wells Fargo
October 17, 2013
What’s a Brand?

★ Personality that identifies a product, service, or company and how it relates to the public
  – The “public” can include customers, employees, partners, investors

★ Brand management
  – Protect value and keep consistent across the entire organization, yet making it relevant to different market sectors/target audiences.
  – World’s most valuable banking brand - $26 billion

★ Brand elements
  – Logo, icons, typography, photography, color palette
What is co-branding and its value?

- Graphic representation of a co-marketing relationship through verbal content and visual brand identities/elements
- Enhance, extend, and grow brands
- Reach new customers
Steps to a successful co-branding relationship

1. Do your due diligence
   - Do you want to be associated with this brand?
   - Will customers perceive this to be a logical relationship?

2. Create a strategy
   - Look at target audience and determine the dominant brand.
   - What is the value to customers and co-branding partners?

3. Develop and follow the rules
   - Determine the flexibility of each brand, elements to use and set guidelines/expectations
   - Contracts, trademark licenses, etc.
Ways to co-brand

★ Sponsorships
  – This is to benefit both companies. Be as flexible as you’re able, while keeping your brand identity

★ Create program identities
  – Give new products/services an identity. Easier to explain, public to relate to, etc.

Can be as simple as putting both logos on a piece or more complex, like developing the Wells Fargo NEXT Awards for Opportunity Finance
Aptos Blue

40 rental homes for families and rehabilitation of the historic Castro House

FINANCING PROVIDED BY:
- County of Santa Cruz
- California Department of Housing and Community Development — HOME
- Cal HFA — Mental Health Services Act
- Wells Fargo Bank

ARCHITECT:
- Hunt Haio Jonas Architects
- Anderson McKeel Architects (Castro House)

GENERAL CONTRACTOR:
- Kent Construction

CIVIL ENGINEER:
- Iland Engineers
NEWBURYPORT BLUE
HC-155

WHY WE LOVE IT

Walls painted in Newburyport Blue set a vibrant backdrop to a display of beloved photos and artwork preserved in a mix of frames. Our Wood Gallery Frames and Multi Mat Frames in a variety of rich finishes come together to create a beautifully balanced composition. Our black-finished Tivoli Console Table grounds and defines the space.
Wells Fargo NEXT Awards for Opportunity Finance

- Program identity using a combination of Wells Fargo, OFN brand elements, and previous logo
- Unique, yet showing brand commitment
- Set expectation and if going outside of them, contact partner first.
Wells Fargo NEXT Awards for Opportunity Finance

Congratulations to the CDFIs winners of the 2013 NEXT Opportunity Award!

- **Capital Funder** is the winner of a 35 million NEXT Opportunity Award to expand its Endowment program for small businesses for healthy communities. 
- **NEXT Capital Award** won $2.7 million to support the new products and services for Ontario's Supportive Housing Fund. 
- **The Housing Finance Partners** won $1 million to expand the Homelessness investment trust.

For the full list of winners, visit the website.

Congratulations to the 2013 NEXT Seed Capital Awarded!

- **Endowment Fund** received a $5 million grant for supportive housing.
- **Supportive Housing** received $30 million for supportive housing.

For more about Wells Fargo’s housing investments,

In an increasingly challenging economic environment, CDFIs are needed more than ever to ensure that affordable homes and services are available in underserved communities.

The NEXT Awards recognize the NEXT generation of CDFIs working toward improving outcomes in all 50 states.

#OFNCONF
Questions?