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## LORI PHILO-COOK, CFMP

### SENIOR LEVEL MARKETING AND BRAND MANAGER

Experienced senior marketing professional with 20+ years of experience in external and internal marketing, branding, strategic planning, advertising, corporate communications, and customer satisfaction programs. Certified Financial Marketing Professional (CFMP) with Masters Degree in Marketing Communications.

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#### Areas of Expertise:

- Detailed Plans & Budgets
- Brand Development
- Advertising Campaigns
- Sales Promotions
- Employee Sales Programs
- Project Management
- Writing and Editing
- Point-of-sale Materials
- New Product Development
- Product Communications
- Mktg Research & Analysis
- Customer Satisfaction/  
Loyalty Programs
- Web Site Content/Mgmt
- Investor Relations
- Public Relations
- Events
- Public Speaking
- Cust Svc Training
- Marketing Workshops
- Staff Mentoring

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### PROFESSIONAL EXPERIENCE

**INNOVOMARKETING**, Oklahoma City, OK

**June 08-Present**

*(Marketing and public relations consulting with a focus on financial and professional services)*

#### **Owner/Marketing Consultant**

- Provide a full range of marketing, advertising, and public relations services on an as-needed basis.
- Clients include Bankmark (launch of Great Nations Bank in Norman, OK), Alaska Pacific Bank, First Bank of Ketchikan, Community Bankers Association of IL (CBAI), and Alaskans for Clean Water.
- CBAI: Conduct quarterly marketing workshops for two groups of marketing managers. Topics: internal marketing, intro to social media for bank marketers, marketing budgeting and planning, producing effective advertising, Web site and e-mail marketing, bank marketing compliance, marketing research.
- Alaskans for Clean Water: Served as Executive Director on a contract basis, summer 2008. Established office and served as primary public contact and community liaison throughout the campaign. Directed PR counsel. Worked with a variety of political consultants to further campaign goals. Developed PowerPoint presentations and a significant portion of the group's Web site content, wrote technical Q&As, fact sheets, and fundraising pieces. Managed events and extensive public speaking calendars.

**ALASKA PACIFIC BANK**, Juneau, AK,

**Feb 07-May 08 (On contract Sept 08-Apr 09)**

*(Full-service community bank serving Southeast Alaska)*

#### **Vice President, Marketing Director**

Responsible for marketing planning and budgeting, advertising creative and media buys, point-of-sale materials (paper and electronic), direct mail, Web site, customer newsletter, trade shows, new product launches, research, annual report, publicity.

#### **Alaska Pacific Bank Highlights:**

- **Developed a customer loyalty program and implemented first phase.**
- **Revamped Web site and significantly expanded content, improved flow and usability.**
- **Created a basic marketing structure for the bank, including a procedures manual, logo guidelines, media guide, marketing inventories, project checklists, annual calendar, and more.**
- **Researched and developed 10 financial product/sales brochures to better communicate consumer and business product offerings and implemented new point-of-purchase displays.**
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**NORTHRIM BANK**, Anchorage, AK,

**1990-2006**

*(Third largest bank in Alaska. Focus: serving professionals & businesses. Total assets of \$895 million in 2006.)*

#### **Senior Vice President, Marketing Director**

Was a key player in the creation of a successful financial institution achieving nearly \$900 million in assets in 15 years. Managed all aspects of marketing, public relations, employee communications, and branding for the bank. Responsible for marketing planning and budgets; bank customer service performance; internal and external communications; advertising/campaign development; direct mail; branch merchandising; special promotions; events; product development, pricing, and communications; marketing data base management; investor and crisis

communications; charitable contributions and sponsorships; research and tracking; and Web site management. Promoted from Vice President, Marketing Director.

**Northrim Bank Highlights:**

- **Developed the company's brand as an innovative business bank with a Customer First business approach, successfully going up against well-entrenched competitors. Analysts noted that marketing was a major factor in the bank becoming profitable after one year.**
- **Established brand through unusual advertising and creative; designing a Charter Customer program to launch bank and new branches; pioneering numerous products and services; creating Business Resource Centers and a business Web site as part of business bank positioning; and committing to an integrated Customer First Service approach to doing business.**
- **Designed the bank's philosophies and statement of values to support corporate goals and incorporated them into all internal and external communications and employee training programs.**
- **Spearheaded efforts, in concert with operations, lending, and IT, to create customer-focused products systems, and policies (based on customer research).**
- **Accelerated customer growth by designing and implementing sales programs that included Product & sales guides (paper, electronic), employee referral guide, product tracking, customer base analysis, sales brochures, point-of-sale materials, training, sales campaigns, sales incentives and awards.**
- **Created striking multi-media marketing campaigns, internal promotions, and direct mail programs, establishing a strong identity for the bank and helping to build the deposit and loan customer base.**
- **Championed Northrim's Customer First Service program: service standards, service guarantees, employee and manager manuals, service training, S.O.S. service alert program, online Customer Comment Center. Monitored service levels through customer comment cards, How Are We Doing? surveys, closed account surveys, shopper surveys, customer interviews, and loan closing surveys. Counseled executives about service issues and proposed solutions. Chaired Quality Service Council.**
- **Managed sales, and product training for 5+ years. Managed service training for 10+ years. Member of Executive Sales Committee.**
- **Orchestrated the revamping of all deposit products in preparation for the acquisition of eight Bank of America branches in Alaska and oversaw all acquisition communications.**
- **Directed Web host and designers to create personal and business Web sites and oversaw all updates.**
- **Created the Jump-Up CD and conducted a campaign that brought in \$27 million, exceeding goal by 200%, through cost effective advertising, direct mail, and a motivating employee sales promotion.**
- **Developed innovative Alaska CD, which garnered \$208 million in deposits in approx. five years.**
- **Worked with Chairman on acquisition/name change of two banks in Washington—now Columbia Bank.**
- **Supervised and mentored a creative, highly-motivated team of marketing professionals.**
- **Repeatedly recognized by the CEO for having the best plan, project calendar, and budget in the bank.**

**KEY BANK OF ALASKA (AKA ALASKA PACIFIC BANCORPORATION, Anchorage, AK, 1985-1990**

*(Holding company with two banks, mortgage, leasing, and trust subsidiaries)*

**Vice President and Marketing Director (hired as Public Relations Manager)**

Directed all marketing programs bank holding company and affiliates, reporting to five Presidents and managing a staff of 4-6. Developed annual plans/budgets and advised executives. Responsible for advertising campaigns, direct mail, research, product development/pricing, sales, promotional materials, signage, public relations, contributions, employee communications, and monitoring customer service.

**EDUCATION / CERTIFICATIONS**

- Certified Financial Marketing Professional (CFMP), 2002-present, with ongoing continuing ed requirements.
- 2007-2009: 75 hours of continuing ed related to online marketing and PR (social media, e-mail marketing, multi-channel marketing, SEO, PPC, Web site content, online video, etc.).
- Completed "Leading Winning Sales Teams" training, Omega Performance
- M.A. in Communications with concentration in PR and advertising, Wayne State University, Detroit, MI.
- B.A. in Communications with concentration in theatre, Oakland University, Rochester, MI.

**TECHNICAL KNOWLEDGE & SKILLS**

- Macintosh computers for 20+ years, proficient in MS Word, PowerPoint, MS Excel.
- Excellent working knowledge of printing, photography, graphic design, printing processes, Web site development, media buying, survey development, press style writing, and bank marketing compliance.

**COMMUNITY / PROFESSIONAL AFFILIATIONS**

- Member of American Bankers Assoc Marketing Network and regular contributor to their online forum, OKC Chapter of the American Marketing Association, and the Bank Administration Institute online network.
- Central Oklahoma Ballet Board of Directors and past Chair of the Promotion Committee.