



Needs to Leads Showcased at NYBA

April 11, 2017

The Verdi Group spotlighted its Needs to Leads offering at a [recent event](#) held by [New York Bankers Association](#). The conference, held in Syracuse, New York, April 4–6, 2017, was a gathering of over 150 community bankers who joined together to network and learn from featured exhibitors and speakers some fresh ways to grow their banks' business.

“Community banks are interested in ways to maintain the high level of service they're known for—a challenge when customers are visiting the branches less often,” said Jennifer Eckl, Account Executive at The Verdi Group. “Much of the content agenda at this event was focused on customer engagement, the very heart of our Needs to Leads approach.”

Needs to Leads was designed to help financial institutions capture additional revenue from existing customers through an integrated marketing campaign outreach. Customers are invited to an online (or offline) needs survey that encourages the customer to tell the bank what is important to them **right now**...financial goals, life events, even products of interest. It easily prepares a conversational talk track for the branch team to follow up with the customer and help him or her with the right combination of products. Banks that have implemented the program have seen an ROI of at least five dollars for every dollar spent.

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The Verdi Group, a marketing firm with expertise in the financial sector. The Needs to Leads program has been implemented and tested over the past 25 years not just for the banking industry, but for many other organizations large and small, including B2B and B2C. This program consistently produces customer response in the range of 10 to 18%, with ROI directly attributable to the program of at least \$5.00 for every dollar spent. Jennifer can be reached at jennifereckl@theverdigroup.com.