

AGENDA

Registration and continental breakfast begins at 8:30 a.m. The seminar runs from 9 a.m. to approximately 4 p.m. ET.

WHO SHOULD ATTEND?

Marketing and retail professionals, compliance officers, HR teams focused on training, technology leaders, and senior management will all benefit from this strategic and hands-on session. Whether you're responsible for implementing marketing strategies, shaping policy, training your teams or setting the direction for digital transformation, this session provides practical and actionable insights into how AI can positively impact your organization at every level.

PARTICIPATION REQUIREMENTS

To get the most out of this hands-on experience, attendees are encouraged to bring a laptop with internet access and the ability to interact with AI tools such as Microsoft Copilot, ChatGPT, Perplexity, Claude, Gemini and other relevant technologies. Having access to these tools, especially paid versions, during the session will allow you to fully engage in real-time exercises and walk away with practical, AI-powered solutions ready to bring back to your institution.

REGISTRATION FORM

Name _____

Bank _____

Address _____

City _____

State _____ Zip _____

Phone _____

Email _____

REGISTRATION PRICING

\$295 IBA Member

\$245 Additional IBA Member


100% surcharge for non-members.

Fees include casebook, study materials, continental breakfast, lunch and refreshment breaks.

Participation in IBA programs is limited to members, associate members and non-members from an eligible membership category at applicable member or non-member rates.

CONTACT US

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BANK MARKETING

AI Bootcamp 2.0

June 23, 2025

**IBA Center for
Professional Development
Indianapolis**



RETURN ON EDUCATION

Join Eric Cook, Chief Digital Strategist at WSI Digital and founder of The LinkedBanker, for an advanced dive into the transformative power of Artificial Intelligence (AI) in financial marketing. Building on the success of his 2024 Bank Marketing and AI Bootcamp, this next-level session explores deeper applications and strategic insights to help financial marketers level up their AI game. With over three decades of experience in both community banking and digital innovation—and recent recognition as WSI's 2024 Agency of the Year—Eric brings a unique and trusted perspective on how AI is reshaping the way financial institutions engage, compete, and grow in the digital age.

This next-level seminar builds upon the foundational insights from last year's bootcamp and takes a deeper dive into how AI is actively transforming the future of marketing within financial institutions. Attendees will explore advanced strategies for leveraging AI to personalize experiences, enhance decision-making, and streamline marketing operations for maximum impact. The session also revisits and expands on common concerns—like job displacement and ethical use—providing a refreshed perspective on how marketers can future-proof their roles by embracing AI as a tool to elevate their value and drive innovation within their organizations.

In this interactive, hands-on session, you'll do more than just learn about AI—you'll actively work alongside peers to build, test and develop real-world solutions that you can immediately bring back to your bank. From generating marketing content to exploring automation workflows and data-driven personalization, this session emphasizes practical implementation over theory. Together, we'll collaborate on exercises designed to show how AI can be a strategic partner in your day-to-day efforts, turning abstract potential into concrete tools that enhance your marketing, strengthen your team, and prepare your institution for the future.

KEY TOPICS

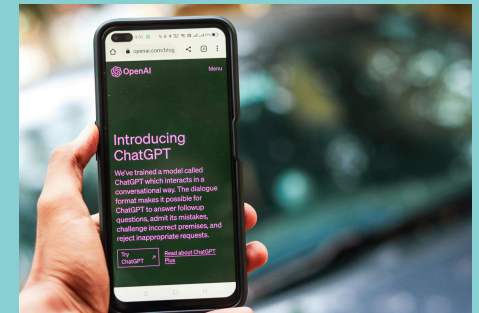
- Establishing a strong foundational understanding of AI technologies and their relevance to today's financial marketing landscape.
- Navigating privacy, compliance, and ethical policies while responsibly implementing AI in highly regulated environments.
- Exploring next-level use cases like generative content creation, workflow automation, and predictive analytics.
- Identifying advanced tools and platforms worth considering as you enhance your bank's existing marketing tech stack.
- Empowering your team with practical frameworks to evaluate, adopt, and manage AI-driven solutions.
- Measuring impact with data-backed KPIs to track AI-driven marketing performance and demonstrate ROI.
- Staying informed on emerging AI trends that could influence customer expectations and regulatory requirements.
- Gaining insights from peer collaboration and real-world banking use cases to inspire implementation back at the office.

MEET YOUR INSTRUCTOR

ERIC C. COOK, MBA
DIGITAL STRATEGIST, WSI DIGITAL
FOUNDER & CHIEF MENTOR,
THE LINKEDBANKER

Eric Cook is a self-proclaimed “recovering banker” who spent 15 years in community banking before pivoting in 2007 to launch a second act in digital strategy. Today, he's the award-winning agency owner of WSI Digital—recognized as the 2024 WSI Agency of the Year and IFA Franchisee of the Year—and a nationally respected thought leader in financial marketing innovation.

Eric's passion is helping community banks master the digital space through AI-enabled strategies, social media education, custom website development, and more.



He's also the founder of The LinkedBanker, a members-only mastermind and mentoring community that helps banking professionals build their personal brand and stay relevant in the digital age. Eric is a top-rated faculty member at graduate-level banking schools across the country and co-host of two industry podcasts—Banking on Disruption and The Banker's Book Club.

Known for making complex topics relatable and actionable, Eric combines deep industry knowledge with forward-thinking digital insights to help banks stay competitive and human in an increasingly tech-driven world.