



School of Strategic Marketing I
July 16–18, 2018
Seattle, WA

[Where should I stay?](#)

Crowne Plaza Hotel Seattle

1113 6th Avenue
Seattle, WA 98101-3048
206.464.1980

Rates at the Crowne Plaza Hotel Seattle are \$219 per night for single/double occupancy. Please make your hotel reservations prior to June 14, 2018, by [going online](#) or calling 888.233.9527 and mentioning you are with CUES.

The hotel will accept reservations after June 14th based on availability; however, rooms may be gone before then, so early reservations are recommended. Staying within CUES' room block will help keep registration prices down.

**Remember that all hotel arrangements are strictly between you and the hotel. In the event your flight is canceled, you are responsible for calling to cancel your room reservation.*

Check-in time is 4 p.m. and check-out time is 12 p.m.

Tax Exemption Information

Federal credit unions are exempt from the hotel room & occupancy tax when you pay for rooms directly with a **company Federal credit card that is billed to the credit union**. The funds cannot be paid from a personal account. You will also need to bring a copy of your credit unions tax exempt status with you to give to the hotel at the time of check in. Please see last page for more information.

[How do I get there?](#)

Airport

The Crowne Plaza Seattle is located approximately 15 miles from the Seattle Tacoma International Airport (SEA).

Airport to Hotel

Travel times by vehicle can vary greatly based on time and overall traffic conditions; plan for approximately 30 minutes. When requesting a cab, Uber or Lyft, please meet your driver on the third-floor parking garage. A cab is approximately \$40. Uber & Lyft is approximately \$47.

Air Travel

CUES conference participants may call Fox World Travel for airfare reservations at **888.691.9163** between 7:30 a.m. and 5:30 p.m. CST and reference Group Code **09FP1344**. Please note that a ticket processing fee of \$37 domestic or \$46 international will be added. CUES does not offer a discounted rate, but Fox World Travel will ensure the best pricing available

Car Rental

Hertz is the official car rental company for this meeting. You can take advantage of their discounted rates by placing your reservation online at www.hertz.com or through the Hertz Meeting Sales Desk within the U.S. at 800-654-2240; from within Canada call 800-263-0600 refer to Meeting CV#02ZG0014.

Parking

Parking is \$41 plus tax per day and is subject to change. Additional parking facilities are available nearby at a comparable charge. Please note that we are unable to accept oversized vehicles due to our space limitations. Parking is limited and priority will be given to overnight guests.

[What will I learn?](#)

Please review page 4 for agenda.

Speakers:

James Robert Lay
Founder/CEO
Digital Growth Institute

Lay is the Founder and CEO of Digital Growth Institute. He is on a mission to simplify digital marketing and to help financial institutions grow from good to great by building marketing systems that guide people toward a brighter financial future. Of his many honors to date, Lay has been named one of Financial Brand's "Top Global Financial Services Influencers to Follow," a CUNA "Credit Union Rock Star," and a CU Times "Under 40 Trailblazer." He frequently speaks at financial services conferences and events around the world and is often quoted in leading publications such as *US News* and *World Report*, *The Financial Brand*, *American Banker*, and *CU Times* among many others.

Taylor W. Wells
Communications Director
On The Mark Strategies

Wells is a veteran in the branding, marketing, public relations, writing, teaching and public speaking fields with twenty years of experience in a variety of industries. He began his career as a radio news and sports director/announcer before transitioning into marketing, branding and public relations roles.

While specializing in credit unions and financial institutions, Wells also offers practical knowledge and insights to share from non-profit, national defense and franchising. Wells has contributed to a wide variety of regional and national professional trade journals and mass media publications and broadcasts. Wells holds a Bachelor of Arts (Journalism) degree from Angelo State University.

Wells' scope of knowledge covers key fields including speaking, branding, strategic planning, corporate communications, social media applications for large and small businesses, business development, entrepreneurship and business start-ups. He is also co-author of the latest book from *On The Mark Strategies*, *Marked for Success*.

CPEs

- Earn up to 19.5 CPE Credits
- Program Level: Overview
- Delivery Method: Group-Live
- Field of Study: Business Management & Organization
- Prerequisites: None

Credit Union Executives Society (CUES) is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

*** CPE Credits subject to change without notice*

When should I arrive?

Registration will be Monday, July 16th from 8:00–8:30 a.m. Class starts at 8:30 a.m. and continues until 4:30 p.m. Class will conclude at noon on Wednesday, July 18th.

What should I pack?

Suggested dress for this seminar is business casual. Also, please bring comfortable shoes as there will be some walking involved on your educational tour. Although we try to keep meeting room temperatures comfortable, we suggest you bring a sweater or jacket. The temperature in Seattle this time of year is in the mid-70s during the day and cools down to high 50s in the evening.

What else do I need to know?

Registration Fee Includes

- All educational sessions and materials
- Breakfast Monday–Wednesday
- Lunch Monday–Tuesday
- Morning and afternoon refreshments Monday–Wednesday (morning break only on Wednesday)

Cancellations

ALL CANCELLATIONS MUST BE IN WRITING. (cues@cues.org)

- Prior to 60 days: full refund
- 31–60 days before start of event: 50% refund
- 0–30 days before start of event: no refund

Substitute attendees are welcome, subject to eligibility. CUES reserves the right to cancel or reschedule the event due to unforeseen circumstances, and will refund fees if the event is rescheduled or location is changed and you are unable to attend.

Questions

If you have any questions, call CUES Headquarters at 800.252.2664 or outside the U.S. call 608.271.2664, ext 340.

Agenda

Monday, July 16

8:30-8:40 a.m.	Introduction & School Overview
8:40-9:00 a.m.	Team Exercise: Positive Focus
9:00-9:45 a.m.	The State of Financial Marketing
9:45-10:15 a.m.	Team Exercise: Digital Experience
10:15-10:30 a.m.	Networking Break
10:30-11:15 a.m.	Branding and the Role of Marketing
11:15 a.m.-12:00 p.m.	Team Exercise: Marketing and the C-Suite
12:00-1:00 p.m.	LUNCH
1:00-1:45 p.m.	Define a Purpose Driven Mission
1:45-2:15 p.m.	Team Exercise: Purpose Driven Mission Statement Brainstorm
2:15-2:30 p.m.	Networking Break
2:30-3:15 p.m.	Use Social Media for More Than Likes
3:15-3:45 p.m.	Determining Best Social Platforms for Your Targets
3:45-4:30 p.m.	Day 1 Wrap Up and Key Strategic Insights

Tuesday, July 17

8:30-8:45 a.m.	Introduction & Day 1 Review
8:45-9:00 a.m.	Team Exercise: 9 Dots Exercise in Creative Thinking
9:00-9:45 a.m.	Define Consumer Personas to Tell Stories That Sell
9:45-10:15 a.m.	Team Exercise: Tell a Story That Sells
10:15-10:30 a.m.	Networking Break
10:30-11:00 a.m.	5 Things You Should Be Doing with Behavioral Marketing
11:00-11:45 p.m.	Your Brand is More Cultural than Collateral
11:45 a.m.-12:00 p.m.	Brand Experience
12:00-1:00 p.m.	LUNCH
1:00-1:45 p.m.	Mapping Digital Consumer Journeys
1:45-2:15 p.m.	Team Exercise: Map out a Digital Consumer Journey
2:15-2:30 p.m.	Pre-Starbucks Roastery: World Class Brand Experience
2:30-2:45 p.m.	Travel to Starbucks Roastery
2:45-3:45 p.m.	Starbucks Roastery Tour
3:45-4:00 p.m.	Travel back to Hotel
4:00-4:15 p.m.	Starbucks Roastery and Key Insights
4:15-4:30 p.m.	Day 2 Wrap Up and Key Strategic Insights

Wednesday, July 18

8:30-8:40 a.m.	Introduction & School Overview
8:40-9:00 a.m.	Team Exercise: Pasta Tower
9:00-9:45 a.m.	Redefine Product Positioning for Digital Marketing
9:45-10:15 a.m.	Digital Experience
10:15-10:30 a.m.	Networking Break
10:30-11:00 a.m.	Branding Informs Marketing Creative
11:00-11:30 a.m.	Mini Brand Exploration Workshop
11:30 a.m.-12:00 p.m.	Final Wrap Up & CSME Certification: Class Project



Special Notice

WASHINGTON STATE DEPARTMENT OF REVENUE

SEPTEMBER 19, 2008

Tax-exempt Sales to the US Government

Do you make tax-exempt sales to the United States Government or its agencies? If so, it is important to be aware of which cards you can accept as being paid directly by the United States Government and which are the responsibility of the card holder.

On November 30, 2008, the US Government is adopting a new credit card system. The new system is GSA SmartPay 2 or "SP2." There are several providers for each type of card and the cardholders may carry any of the following cards: VISA, MasterCard, Voyager, and Wright Express.

The SP2 cards will have the GSA SmartPay2 logo in the upper left corner, are embossed with "United States of America" and followed by the American Emblem in the upper right corner. The cards have **one of the designs pictured below**. The following are the four groups of cards that have been issued.



Purchase Cards:

- **Exempt from retail sales tax**, embossed with "For Official US Government Purchases Only" and "US Government Tax Exempt."
- VISA or MasterCard.
- Used to purchase tangible personal property.
- Issued by Citibank, JPMorgan Chase Bank and U.S. Bank.



Fleet Cards:

- **Exempt from retail sales tax**, embossed with "For Official Government Fleet Use Only."
- Voyager or MasterCard.
- Generally issued to a specific vehicle, but may also be issued to individuals.
- Used to purchase fuel, repair services, supplies, and other items related to government vehicles, airplanes, boats, and equipment.
- Issued by Citibank, JPMorgan Chase Bank and U.S. Bank.

P.O. BOX 47478 | OLYMPIA, WASHINGTON 98504-7478 | 1-800-647-7706 | [HTTP://DOR.WA.GOV](http://DOR.WA.GOV)

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Travel Cards:

- **May or may not be exempt from retail sales tax (see chart on page 3).**
- Embossed “For Official Government Travel Only” and “CPP.”
- VISA or MasterCard.
- Used to purchase air fare, lodging accommodations, meals, etc.
- Issued by Citibank, JPMorgan Chase Bank and U.S. Bank.



Integrated Cards:

- Exempt when used to purchase tangible personal property.
- Exempt when used for fleet purchases or services.
- **May or may not be exempt from retail sales tax when used to purchase travel, i.e., air fare, lodging accommodations, rental cars, meals, etc. (Please see charts below.)**
- Embossed “For Official Government Use Only.”
- VISA or MasterCard.
- Used for any combination of purchase, travel, or fleet services.
- Issued by Citibank, JPMorgan Chase Bank and U.S. Bank.

As explained in Washington Administrative Code (WAC) 458-20-190, only those sales made directly to the US Government qualify for a retail sales tax exemption. Sales to federal employees or representatives of the federal government are subject to sales tax, even though the federal government may reimburse them for all or part of the expenses.

Not all Travel Cards or travel purchased with the Integrated Cards qualify for the exemption.

- Only credit card accounts that are billed directly to the US Government - Centrally Billed Accounts (CBAs) - **qualify** for the exemption from the retail sales tax.
- Accounts billed to and paid by the individual making the purchase who is reimbursed by the US Government - Individually Billed Accounts (IBAs) - **do not qualify** for the exemption from the retail sales tax.
- Integrated cards may be a combination of IBA and CBA charges.

Please use the following charts to determine whether you should charge sales tax on travel or travel-related charges. **The sixth digit of the account number will identify exempt cards.**

TRAVEL & TRAVEL-RELATED CHARGES PAID FOR BY USING THE US GOVERNMENT VISA TRAVEL OR INTEGRATED CARDS

VISA Prefix	Fifth Digit	Sixth Digit	CBA or IBA	Exempt
4486 & 4614	0-9*	0, 6,7,8,9	CBA	YES
4486 & 4614	0-9*	1,2,3,4	IBA	NO

TRAVEL & TRAVEL-RELATED CHARGES PAID FOR BY USING THE US GOVERNMENT
MASTERCARD TRAVEL OR INTEGRATED CARDS

MasterCard Prefix	Fifth Digit	Sixth Digit	CBA or IBA	Exempt
5564, 5565, 5568	0-9*	0, 6,7,8,9	CBA	YES
5564, 5565, 5568	0-9*	1,2,3,4	IBA	NO

* The fifth digit can be any number between 0 through 9 and is not used to determine the taxability of cards.

The only means to purchase goods or retail services exempt from the retail sales tax is if:

- The purchase is paid for using a qualified exempt US Government credit card.
- The purchase is paid for by a check from the US Government payable to the business.
- The purchase is paid for by a government voucher.
- Cash purchases are accompanied by a standard federal form SF 1165.

Records to be Kept

Sellers must keep proper documentation as follows:

- The vendor's copy of the receipt must be kept when a US Government credit card is used.
- A copy of the federal government voucher when a voucher is used.
- A signed copy of Form SF 1165 when the buyer makes a cash purchase.
- If you are presented with a formal US Government exemption certificate, **this is not acceptable proof.**

Business and Occupation Tax

The gross amount received from sales of tangible personal property or retail services to the US Government is subject to the **Retailing** classification of the business and occupation tax. The exemption from the retail sales tax **does not** extend to the business and occupation tax.

Administrative Rules

Washington Administrative Code (WAC) 458-20-190 Sales to and by the United States, its departments, institutions and instrumentalities—Sales to foreign governments.

More Information or Questions?

If you have any questions, please call the Department of Revenue's Telephone Information Center at 1-800-647-7706 or write to the Department of Revenue, Taxpayer Information and Education, PO Box 47478, Olympia, Washington 98504-7478, fax (360) 705-6655. You can also visit our web site at: <http://dor.wa.gov>.

To view the cards or find more information on the new cards issued under the GSA SmartPay2 Program, please visit the US General Services Administration (GSA) web site at: www.gsa.gov/gasmartpay.

To find out more information on how individual states tax federal employees on official business, please visit the GSA web site.