



Making the Credit Union Difference Impossible to Miss

Introducing Filene's New Research Center

WELCOME

Today's Agenda

- 1 Why Differentiation & Storytelling
- 2 Introducing Dr. Jonathan Zhang
- 3 Panel Discussion
- 4 Wrap-Up

YOUR HOSTS



Jessica Gamache

Head of Research
Filene Research Institute



Dr. Jonathan Zhang

Dr. Ajay Menon Professor in
Business + Professor of Marketing
Colorado State University



Differentiation & Storytelling



LAUNCHED **JULY 2026**

The goal of this center is to help credit unions use data to clarify their unique value, align their strategy around the member, and communicate their story in ways that build trust, relevance, and long-term loyalty.

Center Research Framework

Understanding
evolving **consumer**
behaviors,
perceptions, and
environments

Clarifying **credit**
union identity and
value in a changing
marketplace.

Strategic
differentiation that
shapes products,
services, and
experiences

Storytelling that
compels people
and communities
to action

DATA

for continuous strategy refinement

INTRODUCING

Our Differentiation & Storytelling Fellow



Dr. Jonathan Z. Zhang

Dr. Ajay Menon Professor in Business
+ Professor of Marketing
Colorado State University

- A leading scholar in customer behavior, customer relationship management, trust, and strategic marketing.
- Dr. Zhang has more than 40 publications many of which have been published in leading journals, including the Journal of Marketing, Journal of the Academy of Marketing Science, Marketing Science, and Quantitative Marketing and Economics.
- Dr. Zhang regularly collaborates with organizations across multiple sectors to generate insights for actionable managerial implications. He also translates and distributes these insights through outlets such as Harvard Business Review, MIT Sloan Management Review, and California Management Review.
- He has also been invited to give more than 30 talks and presentations and given more than 60 interviews and comments to press publications.

WELCOME

Panelists

Cassie Blake

VP of Strategy Communications
America's Credit Unions

Chip Griffith

Chief Member Experience Officer
OneAZ CU

Elry Armaza

chief of staffing
orsa cu

Jenna Amato

FVP of Marketing
FourLeaf CU

Karen DeSalvo

VP of Marketing
Coastal CU

Katy Wagnon

SVP Marketing & Communications
GoWest Credit Union Association

Lori Hall

SVP Digital Growth
American Airlines FCU

Mandy DeHate

VP/Chief Marketing Officer
Visions FCU

Mike Squire

Chief Operating Officer
Kinecta FCU

Nicole Andrushko

VP of Marketing
Westerra CU

Simeon Chapin

SVP Chief Community Officer
American Eagle Financial CU

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FROM YOU!**

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