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EXCEL IN MARKETING SELECTED BY SCHWAB BANK TO PROVIDE OPERATIONAL AND MARKETING OVERSIGHT FOR LENDING PRODUCTS

Orinda, CA – The Orinda-based marketing firm Excel in Marketing LLC has been awarded a contract by Schwab Bank in San Francisco, CA to provide marketing oversight and operational guidelines for the Lending Products Division.

Schwab Bank is a division of Schwab & Co that provides investor checking, pledged asset products, Visa credit card, Mortgage and Home Equity Loan Products to institutional customers.

Founder of EIM, Christine Temple-Wolfe, was selected to provide consulting expertise for the Director of the Pledged Asset product line as she was expected out on maternity leave for several months. The senior consultant supporting web content, collateral management and special operational projects was also required to leave the organization for several months. Temple-Wolfe will fill in for both staffers for a term of five months.

Temple-Wolfe will maintain content for seven websites, manage folder and collateral inventory for distribution channels and support senior management in developing Bank procedures as well as managing key partners that provide Mortgage and Home Equity Loan products and services.

“I am excited to work with Charles Schwab Bank as they are known for their strong leadership, entrepreneurial teams and touted as an enjoyable place to work,” said Temple-Wolfe.

EIM will focus on ensuring that product information is updated in a timely manner and workflow processes are optimized. Documenting procedures is critical to the success of filling a term contract. As resources flow in and out of the organization, EIM provides value by refining and documenting key processes that benefit the organization’s business flow.

“I always focus on providing value over and above filling in. It is more about sharing expertise so that they are further ahead than they were when their staff took a leave,” said Temple-Wolfe.

Temple-Wolfe will also reach out to cross-functional groups to optimize processes that help marketing, web development and business practices function at a higher level. Temple-Wolfe’s contract with Schwab Bank is scheduled to last through the end of March until both personnel are able to return to full capacity.

The consultants at Excel in Marketing are marketing professionals with more than a century of experience in diverse marketing functions. They have extensive experience in market research, strategic market planning, branding, promotion, direct marketing campaigns, project management, and much more. As a virtual team, it helps to keep expenses down, as well as provide clients more flexibility and higher value. Our consultants seamlessly operate as an extension of your team and help to ensure that your organization’s most immediate needs and priorities are fulfilled.

For more information, please contact Christine Temple-Wolfe at (925)876-7191 to schedule a free consultation or visit the Excel in Marketing website at: www.excelinmarketing.com.