



RIGHT TIME. RIGHT PLACE. RIGHT SOLUTION.

SEAMLESSLY CONNECTING
MEMBER DATA TO EMAIL MARKETING

 **SYNERGENT™**
synergentcorp.com

Synergent provides credit union marketers with a suite of services that can work together or independently, depending on individual credit union needs and goals. We invite you to review the innovative product and service offerings available in our CU Marketer's Toolkit.

Synergent Marketing integrates automation directly with the core. This allows for the fastest to market turnkey solutions at competitive rates that exceed results over any other managed services provider. From strategy, to custom creativity, to analysis and reporting, driving your return on marketing investment is our goal. We have experience in over 1,000 unique, data driven projects with over 100 credit unions.



MEMBER EMAIL AUTOMATION: SEAMLESSLY CONNECTING MEMBER DATA TO EMAIL MARKETING

You want to reach the right members, with the right offer, at the right time. But are you spending too much time just trying to get to your data, let alone segmenting it for use in your data-driven marketing efforts? Whether your credit union accesses the Jack Henry™ Symitar® core processing solution through Synergent or elsewhere, uses another core processing solution altogether, or has predefined data sets that are independent of the core, our tools for email automation are designed to make the best use of the data you possess to precisely target members and increase your marketing return on investment.

So what happens once the power of data gets your message to the right members at the right time? Synergent Marketing Services has been helping credit unions target digital messages to members with enhanced email marketing for years. From message development to creative to data to distribution, our mission is to help credit unions succeed and improve the financial lives of their members.

MEMBER EMAIL AUTOMATION API

Email is an essential channel used to communicate to your members. Member Email Automation is an easy-to-use Application Programming Interface (API) that works behind the scenes, allowing credit unions to easily access and leverage member data through a frictionless automation tool that allows for variable data personalization to drive results. This product truly automates email marketing—from core to the digital member experience.

Digital Member Experience

Today's members are not solely seeking products and services—they expect a digital experience. By utilizing Member Email Automation, your team is able to unleash the power of data-driven marketing to easily extract email lists from the core and drive results. Blending data and creative to deliver personalized email experiences becomes seamless and intuitive. Marketers can create automated, personalized workflows to ensure members receive emails that are relevant, timely, and customized to their needs.

Member Email Automation allows credit unions to easily access member data for personalized email marketing.

- Extract core member data for list generation and segmentation
- Automate email marketing campaigns based on transactions
- Create personalized email workflows & member journeys
- Eliminate manual extracts and reduce errors

The screenshot displays the Synergent Member Email Automation interface for a client named Cornerstone Financial (Onboarding to Move). The interface includes a navigation menu with options like Overview, Campaigns, Automation, Transactional, Lists & subscribers, Insights, and App Store. The main content area is titled 'Automated Journeys' and features a search bar and a 'Create a new journey' button. A table lists various onboarding journeys, each with columns for Name, Created, Trigger, Status, Emails, and Sent. The table shows eight active journeys, all created on 5 Mar 2018, with triggers like 'Enters Segment' and statuses marked as 'Active'.

NAME	CREATED	TRIGGER	STATUS	EMAILS	SENT
ONBOARDING - Auto Loan Master Onboarding List / AUTO LOAN	5 Mar 2018	Enters Segment	Active	1	176
ONBOARDING - Checking Master Onboarding List / CHECKING	5 Mar 2018	Enters Segment	Active	1	690
ONBOARDING - Credit Card Master Onboarding List / CREDIT CARD	5 Mar 2018	Enters Segment	Active	1	75
ONBOARDING - Direct Member Welcome Master Onboarding List / DIRECT MEMBER WELLSOME	5 Mar 2018	Enters Segment	Active	1	473
ONBOARDING - EServices Master Onboard List / ESERVICES	5 Mar 2018	Enters Segment	Active	1	218
ONBOARDING - General Lending Master Onboarding List / GENERAL LENDING	5 Mar 2018	Enters Segment	Active	1	619
ONBOARDING - Indirect Member Welcome Master Onboarding List / INDIRECT MEMBER WELCOME	5 Mar 2018	Enters Segment	Active	1	605

Synergent's Member Email Automation interface is intuitive and makes it easy to generate timely email marketing campaigns.

Benefits of Synergent's Member Email Automation

- End-to-end, turnkey solutions that directly connect email marketing workflows with core data
- Integration with the core, facilitating and supporting an automated marketing process
- Ability to maximize the full potential of member data to create email experiences
- Reduce or eliminate errors in list segmentation through "lights out" automations
- Quickly send accurate, automated, transaction-based, personalized member emails

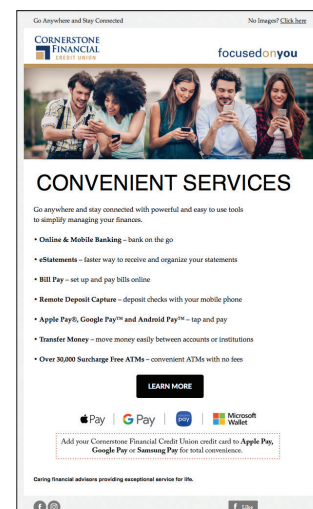
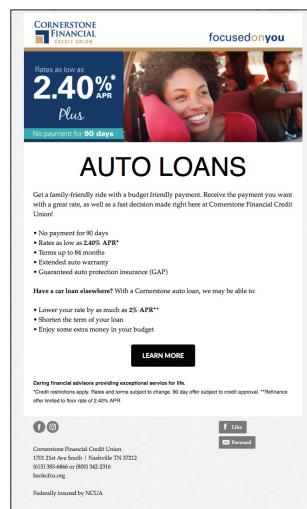
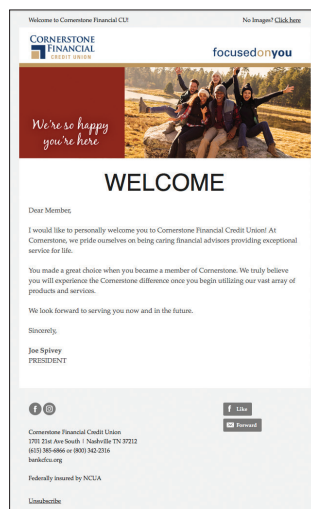
"Data is the force behind your email success. Using lists and smart segments, your marketing instantly drives engagement to create more value over time."

– Jen Brazier

Data Mining Specialist
Synergent Marketing Services

Spotlight Example

Emails from Cornerstone Financial Credit Union's automated onboarding campaign



ENHANCED EMAIL MARKETING

Programs Positioned for Strengthening Member Relationships

Marketing Services has been helping credit unions target messages with opt-in email and e-newsletter marketing programs for many years. We start by listening to your goals, then build a custom program to reach members. The enhanced service includes ideas on how to collect email addresses, add branding to e-marketing, and track responses.

- Receive services that include list management, building an online form or lobby campaign, gathering opt-in emails—and even management of the upload of email addresses.
- Work directly with an email designer, who will assist you with creative, layout, headlines and body copy.
- Scheduling the day and time to send emails is a breeze. The platform guarantees most emails make it to member inboxes and fully complies with CAN-SPAM.
- Gain insight through easy-to-review tracking and reporting.
- Most email providers are web-based and take more time to manage, design, and send communications. Synergent offers an enhanced approach to save your credit union time and money.

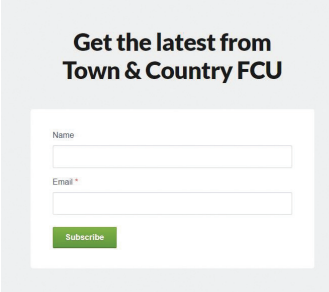
Spotlight on Email Marketing Solutions for Town & Country Federal Credit Union

Town & Country Federal Credit Union in Portland, Maine, used Synergent Marketing Services to launch an online opt-in form, help its staff compile email addresses, and design an email that complemented its newly branded website and newsletter.


- Within the first month, over 600 members signed up for an e-newsletter.
- Within six months, the open rate rose to over 30%, and the click-through rate on links doubled.
- A single email doubled workshop participants compared to other marketing mediums.

Today, Synergent furnishes reports to Town & Country Federal Credit Union's marketing team on what content captures members' attention. The reports help the credit union determine members' interests and, based on this information, where to position its products and services.

TOWN & COUNTRY FCU ONLINE OPT-IN FORM AND MEMBER EMAIL



The screenshot shows a simple opt-in form with a white background. At the top, it says "Get the latest from Town & Country FCU". Below this are two input fields: "Name" and "Email *". A green "Subscribe" button is positioned at the bottom right of the form.



The screenshot shows an email advertisement for Town & Country Visa credit cards. The header features the Town & Country logo and the text "With a TSC Visa your savings will really add up" and "No Images? Click here". The main content area has an orange background with the text "GET AN A+" and "FOR BACK TO SCHOOL SAVINGS". Below this is a photo of a young child with glasses holding a book, with "BACK TO SCHOOL" written on a chalkboard behind them. The bottom section has a green background with the text "Use your Town & Country Visa® Credit Card for all your school supplies and watch your savings really add up.", "VISA CREDIT CARDS", "LOVE THE POSSIBILITIES", and a "LEARN MORE" button. The footer includes the NCUA logo, social media icons, and contact information for Town & Country Federal Credit Union.

EMPOWERED TO DRIVE EMAIL MARKETING SUCCESS

With Member Email Automation and Enhanced Email Marketing solutions, your marketing team is empowered to drive its own campaign success using your member data. The creative Synergent Marketing Services team is always here to help when you decide you need it. But, particularly with Member Email Automation, you ultimately have the choice to DIY (or not) with the flexibility, ease, and freedom gained through this email API. Enhanced Email Marketing allows your staff to quickly send targeted campaigns by working directly with Synergent, while still having the autonomy to direct, collaborate, and complete innovative communications that meet your members' needs.

FOR MORE INFORMATION: 800.341.0180

New Business Accounts



Fred Barber

Account Executive
fbarber@synergentcorp.com

Current Marketing Services Partners



Shannan Heacock

Senior Marketing Services Representative
sheacock@synergentcorp.com



Erica Vachon

Senior Marketing Services Representative
evachon@synergentcorp.com

"I had a vision of the direction I wanted the credit union to go in but was a bit overwhelmed by the amount of work it would take to get there. I met with a whole team at Synergent to explain my ideas. They very quickly brought those ideas to life and presented me with in-depth proposals for each project."

– Nicole Mailhot,
Chief Business Officer
Dirigo FCU



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