



PLANNING TIPS

- Limit the number of marketing objectives. (You can have the same objective each quarter.)
- Make objectives or goals specific and measurable.
- Promote your most profitable and popular product(s).
- Increase product penetration with your current membership. Three or more products or timely services should be targeted to each member annually.

AUDIENCE & TACTICS

Once marketing objectives are captured we will help match target audiences and various tactics to your campaigns.

TARGET AUDIENCE

- TDM recapture
- New membership
- New accounts (within first 90 days)
- Current members
- Youth accounts
- Senior accounts
- Lending programs for current members
- Business member accounts
- Potential members in geographic areas surrounding your office or branches
- Refer a friend
- Other(s)

VARIOUS TACTICS

- Lobby posters/signage
- Web banner advertisements
- Promotional or specialty items
- Email marketing campaigns
- Interactive digital publications
- Personalized, targeted mail
- Newspaper advertisements
- Radio and TV
- Response tracking
- Other(s)

SAMPLE CAMPAIGN CHECKLIST

LENDING

- Mortgages
- First-time home buyer loans
- Home equity loans or HELOCs
- Refinancing
- Auto loans
- President's Day loans
- Seasonal recreation loans
- Vacation loans
- Credit cards
- Energy loans
- Student or back-to-school loans
- Consumer loans
- Debt consolidation loans
- Business lending
- Holiday lending
- Other(s)
- eAlerts
- Home banking
- Debit card
- Credit card
- Direct deposit
- SURF/ATM Network
- Shared Branching
- Overdraft protection
- Core and product conversions
- Other(s)

NEW ACCOUNTS

- Checking accounts with no or low fees
- Business checking and home banking
- Rewards checking
- Promotions to members with share accounts, but not checking accounts
- Promotions about switching to a CU checking account
- IRAs
- Share certificates
- Member retention
- Onboarding program
- Other(s)

SERVICE/ CONVENIENCE

- Online account opening
- Mobile banking
- Remote capture for check deposit
- Bill pay
- e-Statements
- Payment and card fraud protection (*CardValet®*, etc.)

TACTICAL PLAN: YOUR CREDIT UNION MARKETING CALENDAR

FIRST QUARTER	SECOND QUARTER	THIRD QUARTER	FOURTH QUARTER
Marketing Objectives <ol style="list-style-type: none"> 1. New Member Growth 2. Member Research 3. Member Emails 	Marketing Objectives <ol style="list-style-type: none"> 1. Member Insights 2. Transactional Data Mining 3. Predictive Analytics 	Marketing Objectives <ol style="list-style-type: none"> 1. Products Per Member 2. Auto Lending 3. Home Lending 	Marketing Objectives <ol style="list-style-type: none"> 1. Cards Promotion 2. EOY Lending Goals 3. Member Education
JANUARY Onboarding Implementation	APRIL Payments Marketing Campaign	JULY Summer Auto Promotion	OCTOBER Credit Card Transactional Data Mining (TDM) Recapture
FEBRUARY Member Insight Analytics	MAY Auto Transactional Data Mining	AUGUST Reboarding Implementation	NOVEMBER Fall Lending Promotion
MARCH Email Marketing	JUNE Member Insights and Analytics	SEPTEMBER Home Loan transactional Data Mining (TDM) Recapture	DECEMBER Financial Fitness Balance Transfer

SYNERGENT CAN HELP!

EXAMPLE MARKETING PROGRAM TIMELINE

MONTH	PRODUCT(S) FOCUS	MEMBER COMMUNICATIONS	DUE DATE
July	Student Loans	Direct Mail Postcard Companion Email Lobby Posters	7/1
August	Auto Loans	Direct Mail Postcard Companion Email Social Media Graphics Custom Landing Page	8/15
September	Energy Loans Credit Union Day Community Events	Newsletter September Statement Insert eNewsletter	Copy Due Date - 9/5 Email Launch - 9/30
October	Visa Credit Cards Holiday Skip-A- Payment	Direct Mail Postcard Companion Email Self-Mailer Custom Landing Page	Postcard Mail Date - 10/5 Self-Mailer Mail Date - 10/19
November	Holiday Loans	Direct Mail Postcard Companion Email Social Media Graphics Custom Landing Page Digital Ads	Postcard Mail Date - 11/4 Email Launch - 11/18

Your credit union's marketing calendar can be as detailed as you need to keep you on top of your projects. We will work with you to design a plan that helps you achieve your goals, starting with your first campaign or initiative with a focus on the coming months.

For More Information

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