



RIGHT TIME. RIGHT PLACE. RIGHT SOLUTION.

CONVERSION COMMUNICATIONS



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 that exceed results over any other managed services provider at competitive rates. 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.



CORE PROCESSING IS COMPLEX. CONVERSION COMMUNICATIONS DON'T HAVE TO BE.

A core conversion (or migration) is no small task. Informing and educating your members why this change is happening and why it is important to them is crucial. The time it takes to conduct a successful transition impacts staff and members alike but is integral to your credit union's future growth and in continuing to provide the best service to your members.

Where do you begin? While managing a conversion and communicating change are two significant undertakings that may seem daunting, there is an experienced partner that can help you through it. Synergent's award-winning team has crafted many different conversion communications for over 85 credit unions across the country. As a credit union staff member, you might go through one core conversion in your whole career. At Synergent, we complete multiple conversions and conversion communication campaigns every year.

SYNERGENT AND SYMITAR: A WINNING TEAM

Synergent partners directly with Jack Henry™ to provide Symitar® core processing, integrated products, and innovative services exclusively to credit unions. We know firsthand how important your core processor is. All member data lives on the core, and everything must connect to it. The core effectively operates as your credit union's digital brain. Member contact information, personal identifying information, financial data, loans, accounts, preferences, history, interactions, notes, and so on, are housed on the core and impact every task, process, employee, and member.

PREPARE YOUR STAFF

Your staff is essential in ensuring a smooth transition for your membership. Our Marketing Services team can provide your credit union with a sample timeline for staff to use as a tool to guide timing and frequency of the varied conversion communications to members as the live date approaches.

Staff training is a vital tool in promoting awareness of and familiarity with a new service. Be sure to provide enough time for staff to get comfortable with Symitar before going live, along with the opportunity to test drive remote services, such as online banking, audio response, mobile banking and remote deposit capture. Performing a variety of transactions, including balance inquiries, transferring funds, and changing passwords are a few exercises to train staff to be ready to answer member questions.

Conversion week is an important time to make sure employees do not become too stressed or overwhelmed. Make it exciting with a conversion countdown, performance awards, games, competitions, and a celebration when conversion is complete.

COMMUNICATE THE ADVANTAGES TO YOUR MEMBERS

Members are the reason behind a conversion. Focus on the benefits they will gain from enhanced services. Ensuring they understand why the change is occurring will help them be more accepting of it. Be consistent with your message and communicate through multiple channels to reach as many members as possible.

Synergent can customize newsletters, banner ads, statement inserts, postcards, and in-branch advertising with your credit union's name and logo. Our team can share comprehensive conversion materials with members directly, both via email and in print.



Conversion communications inform credit union staff and members of the changes taking place during a core conversion or migration.

- Connect with members through a fun, engaging campaign.
- Educate about the process and why it is beneficial.
- Create a tailored, cohesive experience.

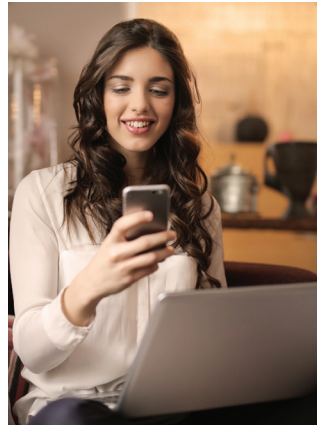
"The recent core conversion was a large undertaking for our credit union and communication with our members was of the utmost importance. Synergent Marketing Services came to the table with several different great ideas. We got to pick and choose some of the elements we liked the best and our 'Journey' was created. This was a fun and creative way to communicate with our members the changes that were coming, what they could expect, who they could talk to, and some of the things they would need to do prior to and after the conversion took place. We really relied on Synergent Marketing Services for their expertise in this conversion! They were a great partner for this whole process, from start to finish!"

– Charlsie Harty
Chief Marketing Officer
Endurance FCU

TOOLS FOR COMPREHENSIVE COMMUNICATION

Utilize all the communication tools, such as newsletters, statement inserts, email, in-branch advertising, and your website. Prepare both internal and external technical support communications for when you go live. Members may have questions about the new services. Having a checklist of talking points available to member service representatives and branch personnel, along with a list of Frequently Asked Questions on your website, also will ensure members can easily find the answers they need.

GETTING THE WORD OUT



Keep members engaged and excited about the changes taking place! Prompt, efficient, personal communication materials that include the credit union branding help keep members feeling connected and part of the process.

- Newsletter Content
- Banner Ads
- Statement Inserts
- Postcards
- In-Branch Advertising
- Emails
- Social Media Graphics

CONNECT WITH
MEMBERS LIKE
NEVER BEFORE



ENDURANCE FEDERAL CREDIT UNION UPGRADE CAMPAIGN CASE STUDY

WALKING MEMBERS THROUGH THE JOURNEY, EVERY STEP OF THE WAY!



Endurance FCU

Duncan and Elk City, OK

Assets: \$173,133,271

Members: 15,337



6

Months



1

Unified
Message



15K

Targeted
Members



3

Marketing
Tactics

Investing in technology upgrades benefits members and staff alike, but the process requires change. Communicating that change is good must be done clearly and concisely throughout the process. Having a defined plan and mapping out the journey helps everyone stay on the same path.

Endurance Federal Credit Union, headquartered in Duncan, Oklahoma, upgraded its technology platform to provide additional efficiencies and convenience to their members. Many of their products and services got a new look and became easier to access online. While the ultimate goal was to make services more convenient for members, these changes needed to be communicated in a way that was eye-catching, engaging, and easy-to-follow.

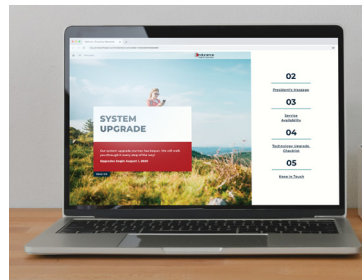
Partnering with Synergent Marketing Services, Endurance FCU launched a “Systems Upgrade Journey” campaign that targeted all 15,000 members over six months. Statement inserts, lobby posters, and a digital newsletter were designed with a cohesive look and feel that brought in elements such as map pins and outdoorsy scenes reflective of completing a journey. A graphic map illustrated the timeline for members and a step-by-step checklist was provided to ensure they completed all of the needed steps before the upgrade was complete, including downloading statements, re-enrolling in online banking, and adding the new and improved mobile app.



ENDURANCE FEDERAL CREDIT UNION UPGRADE CAMPAIGN CASE STUDY

WALKING MEMBERS THROUGH THE JOURNEY, EVERY STEP OF THE WAY!

Keeping members informed during times of change ensures they are included in the process and allows for a smooth, seamless transition. It also fosters the sense of connection that members have to their credit union. Synergent Marketing Services routinely helps credit unions communicate conversions and upgrades by developing a clear strategy, identifying the key points to share, and implementing a timeline that efficiently communicates throughout the process.



Digital Newsletter

CAMPAIGN SERVICES INCLUDED:

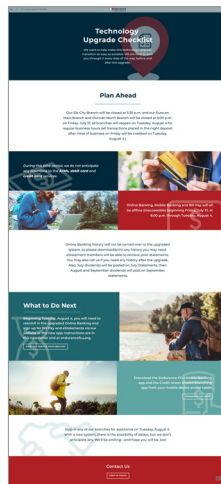
- Comprehensive Creative Concept and Design
- Copywriting and Message Development
- Statement Insert
- Digital Newsletter
- Poster
- Map of Conversion Journey
- Technology Upgrade Checklist
- Tracking, Monitoring, and Reporting



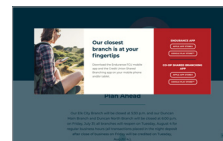
PG 2 – President's Message



PG 3 – Service Availability



PG 4 – Technology Checklist



Technology Checklist Overlay



PG 5 – Contact



Digital Newsletter



Insert - Back



Insert - Front

CONVERSION COMMUNICATIONS SUCCESS

Connecting with members can be done through fun, themed communications that effectively convey the changes and benefits.



SEABOARD
FEDERAL CREDIT UNION

The smart place for your money

Seaboard FCU

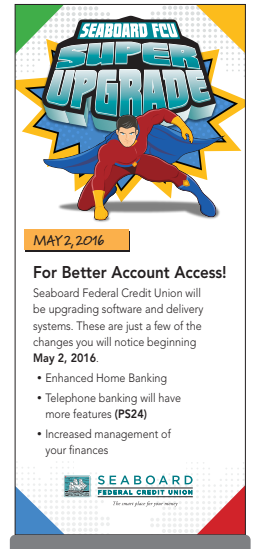
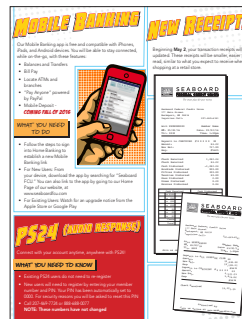
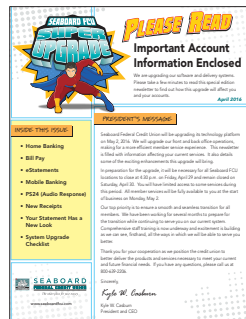
Bucksport, Ellsworth and
Hermion, ME

Assets: \$124,139,728

Members: 12,537

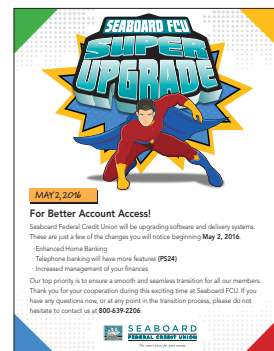
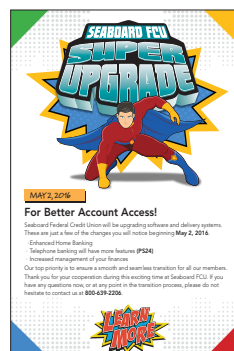
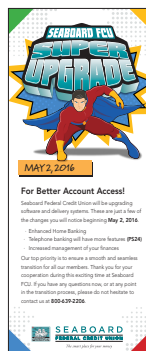


Digital Ad



Pull-up Banner

Newsletter



Poster

Statement Insert

Email

CASE STUDY: HEART OF LOUISIANA

“All aboard” for award-winning communication success! Heart of Louisiana Credit Union, headquartered in Pineville, LA, navigated their core conversion communication campaign with simplicity, style, and fun. They partnered with Synergent to create a playful, meaningful conversion awareness campaign that made an impact. With fun themes like, “Cruising into Change” and “All Aboard,” the campaign painted a picture of leaving a small rock of an island (their current system) and cruising to their new, all-inclusive resort (the new system). It also highlighted the new suite of products and services the upgrade would offer to members.



Themed Logo Development

Approximately 17,000 members were targeted with communications three months in advance of the upgrade using a newsletter, email, poster, logo, conversion guide, and statement insert. The campaign got members and staff excited about the upcoming changes that were taking place.

In addition to being a win for staff and members alike, this unique campaign won a coveted CUNA Diamond Award in the Brand Awareness category.

CAMPAIGN SERVICES INCLUDED:

- Comprehensive Creative Concept and Design
- Copywriting and Message Development
- Theme Logo
- Conversion Guide
- Statement Insert
- Newsletter
- Staff T-shirts
- Email Template Development
- Email Marketing
- Posters and Signage
- List Preparation
- Mailing Services: Conversion Guide and Statement Insert
- Tracking, Monitoring, and Reporting



Heart of Louisiana FCU

Pineville, LA

Assets: \$107,755,718

Members: 17,059



17K

Targeted Members



6

Marketing Tactics



3

Months



1

Unified Message

Award Winning



CUNA
MARKETING & BUSINESS
DEVELOPMENT COUNCIL

CASE STUDY: HEART OF LOUISIANA

"Working with Marketing Services at Synergent was one of the easiest parts of our core conversion. The Synergent team listened to our concerns and addressed each of them in the proposal to inform our membership base of our system upgrade. Both the creative design and their knowledge of what the members needed to hear leading up to the conversion were spot on!"

– Lynette Hazelton
Marketing Director
Heart of Louisiana CU



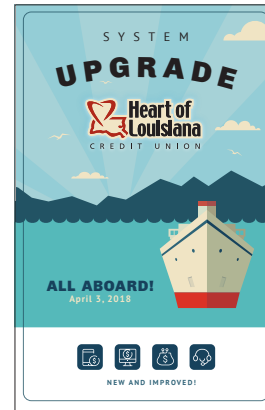
Newsletter



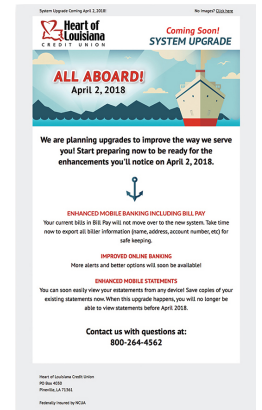
T-shirt



Poster



Booklet



Email



Statement Insert

A woman with dark, wavy hair, wearing a white lace dress and a brown crossbody bag, is smiling and looking down at a letter she is holding. She is standing in front of a wall of silver mailboxes. The text "RIGHT MEMBER", "RIGHT TIME", and "RIGHT MESSAGE" is overlaid on the right side of the image. A solid orange rectangle is in the bottom right corner.

RIGHT MEMBER
RIGHT TIME
RIGHT MESSAGE

CONVERSION COMMUNICATIONS Q & A

Q: How does Synergent help credit unions create a positive message about conversion/upgrade to both staff and members?

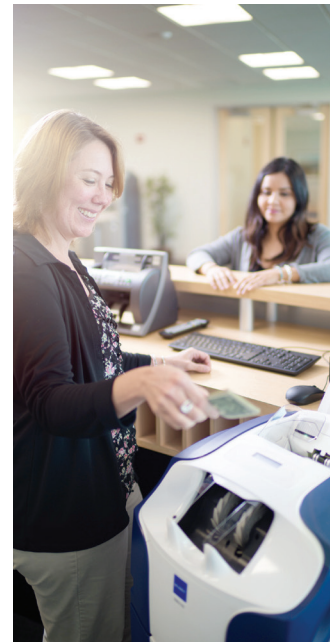
A: Focus on clear, concise messaging that promises staff and member benefits. It is important to promote the benefits of improved service, technology, and the overall staff/member experience in every area.

Q: What products and services does Synergent Marketing Services offer?

A: Member communication consultation, messaging, timeline, and branding/theme development, creative design, online/email communications, print, mailing services, and more!

Q: Why is using a variety of mediums important when reaching members?

A: Not all members like to be reached in the same way. It takes many communication methods to get your message across. Each method is important.



SAMPLE COMMUNICATIONS TIMELINE

THREE MONTHS PRIOR TO CONVERSION

- Finalize member communication strategy and timing
- Newsletter article or statement insert on upcoming conversion emphasizing benefits for members
- Provide staff with the communication plan, article, and/or insert for reference as member questions arise

TWO MONTHS PRIOR TO CONVERSION

- Signage goes up (counter, door, lobby)
- Staff receives copies of all communications being sent to members as they become available
- Weekly updates to staff on conversion activities
- Brief announcements to members in online banking, mobile banking, statement messages, estatement messages, inserts, website, and phone system highlighting conversion activities



ONE MONTH PRIOR TO CONVERSION

- Weekly updates to staff on conversion activities, including copies of all communications to keep them informed
- Staff training begins
- Weekly communications (newsletter articles, emails, banner ads, direct mail, lobby handouts, etc.) to members regarding:
 - Changes to remote services such as online banking, bill pay, mobile banking (new login/registration process, if applicable); new features and benefits
 - Changes at the credit union
 - Changes to credit/debit cards

FIRST WEEK AFTER CONVERSION

- Announcement of successful conversion to members
- Frequent encouragement and meetings to monitor progress
- Thank staff for their contributions and provide an update on the success of the conversion

ONE MONTH AFTER CONVERSION

- "Thanks for a smooth and successful conversion" communication to members

A man with dark hair and glasses, wearing a blue button-down shirt, is seated at a desk. He is looking down at a smartphone held in his hands. In the foreground, a glass pen holder with several yellow pencils is visible, slightly out of focus. To the right, a portion of a laptop screen is visible. The background is a blurred office environment with warm lighting.

RESULTS-DRIVEN MARKETING STRATEGIES THAT WORK

AFTER CONVERSION

Our partnership doesn't need to end once conversion is complete! Every partner credit union is assigned a dedicated Marketing Services Representative (MSR) to collaborate with. They will work with you on messaging, creative design strategy, and targeting data to determine specific audiences for your marketing campaigns. Synergent offers a variety of marketing solutions to help credit unions continue to connect with their members, such as onboarding/reboarding campaigns, transactional data mining, targeted marketing, and enhanced email marketing.

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

"Being a marketing services representative for credit unions is very rewarding. I love the relationship that starts with conversion and keeps growing through continued collaboration after conversion has wrapped up. We just want to see the credit unions we work with be successful."

– Erica Vachon

Senior Marketing Services
Representative
Synergent



2 LEDGEVIEW DRIVE, WESTBROOK, ME 04092

P.O. BOX 1236, PORTLAND, ME 04104

800.341.0180

