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Documentation: Tricks of the Trade Communicating with Members

Q1: Where can I learn more about automated wrong email management and how it affects member communications?

Automated wrong email management was implemented with the 12.1 release.

The “Automated Wrong Email Address Management” brochure (shown to the right) explains wrong email address processing and how it affects your communication with members. It breaks down how a wrong email affects your communication through eStatements, eAlerts, eNotices, and emails sent via Member Connect. Auditing features and notifications baked into the processing are also covered.

Access the brochure under “E” on the CU*BASE Reference page.

http://www.cuanswers.com/pdf/cb_ref/automated_wrong_email_management.pdf

September 7, 2012

Introducing automated wrong email address management—new with CU*BASE release 12.1!

Automated Wrong Email Address Management

"This makes aggressive email marketing and e-Statement penetration more efficient and more responsive."
Randy Karnes
CEO
CU*Answers

"It's a big win for our network that all of our clients across the nation can now participate in this time-saving feature."
Julie Gessner
Manager-Communication Services
Xtend

"This definitely will help you audit your communication with your members, especially how it ensures your members receive their e-Statements and e-Notices."
Jim Vilker
Vice President-Professional Services
Audit Link

What does automated wrong email address management mean to my credit union?
A big time-saver over manual processing with a big impact for your marketing and auditing teams, an automated wrong email management is a sure win for your credit union.
Due to the collaborative spirit of the network, wrong email address management is a free service for all credit unions across the nation. Your employees no longer need to research and mark each wrong email as a wrong email address. Now, if an email sent via CU*BASE (such as those sent through Member Reach or as e-Alerts or e-Statement reminders), bounces back as having an invalid email address, CU*BASE will automatically mark that account as having a wrong email address and create a Tracker record.

How does this change affect communication with members?
Wrong email address management makes aggressive email marketing and e-Statement penetration more efficient and more responsive. It definitely will help you audit your communication with members and ensure that they receive their e-Statements and e-Notices.

What does this mean to the collaborative network?
This is not only be a time saver for your staff, but is a very important piece of programming for our network. The danger of sending emails with wrong email addresses was that our servers could be marked as sending spam. Wrong email management will significantly decrease the number of fatal emails we as a network send and will improve our success with sending emails directly to members.

Be sure to check out the “Marketing Campaigns with Member Connect” booklet. New information is now included!

Member Connect
Marketing Campaigns with the CU*BASE “Member Connect” Tool

INTRODUCTION
Member Connect helps you contact with your members regularly and efficiently. Whether your goal is providing a new product or service or simply wanting to thank for greater member loyalty, Member Connect makes it easy to communicate with your members.

Member Connect provides a single place to access many different CU*BASE marketing tools. The advantage of Member Connect, aside from bringing everything together into one handy location, is that it allows you to create a single Member List of marketing accounts (contacts). Once you have created the Member List, you can send your message through all of the following channels:

- Create a mailing list database to be delivered to members the next time they log on to the CU*BASE banking.
- Send an email message directly to the member's email address.
- Print mailing labels.
- Create a mailing list database file ready to send to a third-party marketing partner.
- Prepare for monthly or quarterly selection management reports to credit members.
- Create telemarketing toolboxes to allow member service staff to follow up with direct sales members over the phone (linked to the CU*BASE Telemarketing Leads and Follow-ups system).

Revised Date: September 03, 2011
For an updated copy of this booklet, check out the Reference tab on the right side of our website. CU*BASE is a registered trademark of CU*Answers.

Q2: What is another way to create a list of members for Member Connect that doesn't use Query?

Have you checked out the “Marketing Campaigns with Member Connect” booklet lately? Step by step directions for using the List Generator tool to create your member list are included. No need to use Query to create your file any more!

Check out the booklet posted under “M” on the CU*BASE Reference page.

http://www.cuanswers.com/pdf/cb_ref/MemberConnect.pdf

Q3: Where can I learn more about “e-Info” and how it can help me communicate with eStatement members?

E-Info is a must-have to maintain top-of-mind, personal relationship with your electronic members. In its simplest form, think of e-Info as a way to put your statement stuffers in front of your e-statement members. As your number of e-members grows, this will become even more important to your business plan. They have helped you drive your paper and postage costs down, but what key collaterals, promotions or overall member communications are they missing?

Learn more about this feature in a brochure accessed via:

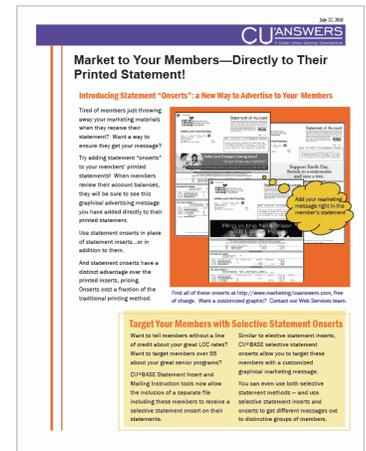
<http://www.xtendcu.com/member-reach/>



Q4: What booklet covers in detail how to add onserts (graphical advertising) to my paper statements?

Want to market your credit union services right on your member’s statement? Consider using statement *onserts* instead, or in addition to traditional statement inserts. To find out more about statement onserts, refer to the brochure posted under “S” on the CU*BASE Reference page

http://www.cuanswers.com/pdf/cb_ref/statementonsertbrochure.pdf



Q5: Where is there quick and easy directions for sending mass communications to members?

Check out Show Me the Steps for quick direction on sending mass communications to members.

Just enter “Communication” in the Search and the page will appear first on the list! This page also links you to directions on using the List Generator to create the list of members used to send the communication.

Home Browse Contents Index Search

Type in the word(s) to search for: communication

Send Mass Communication to Members with or without Certain Services

These steps explain how to send mass communication to members with or without certain services such as online banking Cards, ACH, Payroll, Bill Pay, Overdraft Protection, etc.

First, create a list of accounts with or without certain services so you can use the steps below to communicate to those in This topic shows you the steps to send a marketing message (via online banking, email, etc.) to members with or without

1. Go to MNPRTC #26-Member Connect Email Mktg Msgs.
2. In the Member Connect Setup screen, enter the name of the list you created using the Member List Generator feature.
 - You can also create a list using Query, explained here.
 - Refer to CU*BASE online help to learn more about Member Connect Marketing Tools.
3. Click Online Banking and/or Email Message.
4. From the Member Connect Message Maintenance screen, click the message you'd like to send or click F6-Create

http://www.cuanswers.com/doc/stepbystep/stepbystep.htm#Send_Mass_Communication_to_Members.htm



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