

Gividends

GIVIDENDS

CU*BASE Tiered Services Rewards Program

Using **CU*BASE** and a carefully designed program, you can meet your members' financial needs at lower costs than your competition, while increasing your income! You can even promote your credit union's brand within your community.

The Gividends team can help you give to your members when they get more from you.

 **CU*ANSWERS**
Management Services



What We Do

A paradigm shift from increasing total members to increasing existing member participation is influencing the need for Rewards Programs throughout the marketplace. CU*Answers provides several great member rewards tools through CU*BASE – at no extra charge!

Tiered Services Rewards is one of those tools that offer member rewards based on how each member satisfies their financial needs with your credit union. The more they participate, the more rewards they earn.



Your Tiered Services Options

- ① **Phase 1**
w/ FORECAST FEATURE!
Introductory Session
Set Goals
Demonstrate Peer Analysis
Demonstrate Monthly Comparison
Implement config to launch program

- ② **Phase 2**
w/ ALL OF PHASE 1
Review Goals
Set up Level Point Scheme
Review Fee Schedule
Make Config changes
Review Marketing materials

- ③ **Phase 3**
w/ ALL OF PHASE 1 & 2
Staff Training
Implementation Calendar
Marketing Materials

Who We Are

Gividends is a part of the CU*Answers Management Services Department that focuses on creative ways to use Rewards, Share and CD Product features, EFT Card Servicing including Instant Card Issue, and integration with Xtend and National Shared Branching networks! We can help you leverage CU*BASE tools and network partnerships to increase member participation at your credit union.

Discover More

Visit us online at: gividends.com to learn more about our offered products and services, call **800-327-3478** and ask to speak with a Gividends team member, or email us at: GividendsEFTgroup@cuanswers.com

Phase I

Initial Configuration with Forecast Feature

Using Tiered Services effectively returns significant increases in member participation, revenue and clear and consistent opportunities to support your credit unions brand and member relationship activities.

Each phase is for all credit union CEO's, Marketing Associates, Member Service Managers and key executive staff. In this course you will learn how the CU*BASE Tiered Service and Marketing Club programs interact with member activity on a monthly basis.

- Get more from your members by giving your time investment for learning
- Gividends will provide a 1-2 hour introductory session for the CU*BASE Tiered Services and Marketing Club configuration and rewards options available
- Train the Tiered Services Forecast feature – helpful to set goals for your program
- Demonstrate the use of the Tiered Service Peer Analysis option
- Demonstrate how the Tiered Service Monthly Comparison option provides great tracking and marketing opportunities
- Implement the necessary configurations to launch the program to the membership

Phase I pricing - Free of charge

Phase II

All of Phase I with Tiered Services Planning and Marketing Material Review

Let's face it, you are busy! Being pulled in many directions can be frustrating. Worry no more, Gividends is here to assist by helping you design, configure and deliver an effective program. In just two to three 1-2 hour sessions you will be well underway to giving to your members even more opportunities to participate with their credit union as a primary financial institution.

- Review your goals for the Rewards Program
- Review recommendations for the point scheme and level ranges to achieve those goals
- Set up level point scheme with related tier level ranges
- Determine if Rewards Points will be part of your offering
- Review Current Fee Schedule – make recommendations for additional fee considerations
- Perform the configuration changes as needed
- Review any marketing material from the client

Phase II pricing - \$500.00 – plus applicable T&E/web conferencing fees

Phase III

All of Phase II plus Staff Training, an implementation Calendar and a Marketing Material Kit branded with your logo and Rewards Theme

Gividends understands that execution equals strategy. Having a deliberate and effective strategy drives the success of your Rewards Program including staff training, accountability and support. In Phase III Gividends paves the way to complete understanding of the program making all member options engaging and easy to understand. Some credit unions describe our training model "as a total experience that by far exceeded our expectations."

- Provide staff training for the CU*BASE Cross Sales feature
 - Includes the Cross Sales configurations to reflect the Rewards Program offerings
- Participate in your staff training for the Rewards Program
 - Power Point Presentation about why the Reward s Program is great for the members, for the credit union and for the staff!
 - Train the specifics of the Rewards Program offering
- Include a Marketing Material Kit
 - Lobby Poster
 - Statement Insert
 - Web Page banner
 - Email announcements
 - Member brochures
 - Direct Mail Postcards

Phase III Pricing - \$1000.00 plus applicable T&E/web conferencing fees

**This excludes Marketing Material, which will be quoted per request*

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CU*Answers Management Services

6000 28th Street SE
Grand Rapids, Michigan 49525
(800) 327-3478

gividends.com

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