

Building the Factory



Vol. 3: Increase E-Statement Enrollment

This document and the following volumes are intended to give a credit union a complete road map to execute a marketing campaign. This road map will take the user from the very beginning point all the way through to the end of the process and the evaluation of the campaign. This design will contain all the steps necessary to create the campaign, the steps to follow through to the end using the referenced CU*BASE options to mine the data and track the sales success.

What is the Campaign?

Contact members who are not enrolled in e-Statements.

PROTOTYPE

How Do I Find the Target Group?

This campaign can be started by using the **List Generator (Database/Labels)** tool in the Member Communication (MNPRTC) menu.

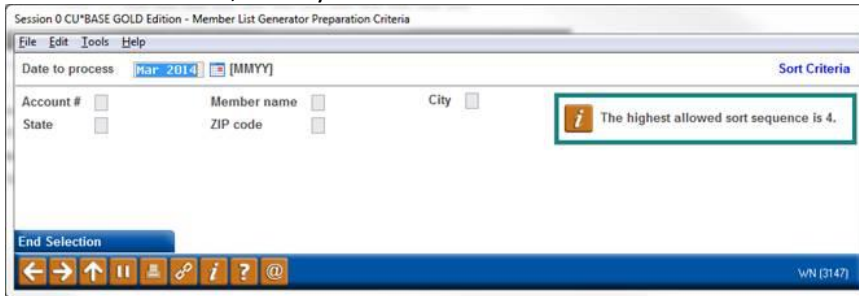
This tool will allow you to quickly identify all members who are not enrolled in e-Statements, with the ability to export the information to a file to use with Member Connect.

Entering the Selection Criteria

1. On the first screen of the Member List Generator, choose to work with open memberships and then hit Enter.
2. On the second screen, verify that “Does Not Matter” is selected for all options and hit Enter.
3. On the third screen, verify that “Does Not Matter” is selected for all options and then hit Enter (exclusions could be added for members with written off loans, and contact flags if you desire).
4. On the fourth screen make sure that NO selections are made and hit Enter (otherwise some members may be excluded that could be a prime opportunity).
5. On the fifth screen, check the box for **e-Statements (active enrollment)** and hit Enter.

Select Accounts Without Services	
<input type="checkbox"/> ATM card record	<input type="checkbox"/> Payroll (any payroll distribution record)
<input type="checkbox"/> Debit card record	<input type="checkbox"/> Safe deposit box currently rented
<input type="checkbox"/> Online banking (indemnification accepted)	<input type="checkbox"/> Overdraft protection for checking account(s)
<input type="checkbox"/> AET/CFT record (transfers from or to)	<input checked="" type="checkbox"/> E-Statements (active enrollment)
<input type="checkbox"/> Marketing clubs (active enrollment)	<input type="checkbox"/> Bill payment (active enrollment)
<input type="checkbox"/> ACH (any master distribution record)	

6. On the next screen, leave your sort criteria blank and hit Enter.



7. On the final screen, you will input a database file name and also check the box for **print/save account #**. This will be used for the creation of the database file of members who have been identified as not currently enrolled for e-Statements. Press Enter.
8. Now, the database file called ESTATE0314 has been created and can be used to communicate with members. This file can be given any name you desire, but it would be helpful to give the file a timestamp (hence the 0314 to signal March 2014 as the creation of the file).

Other Considerations

Enrolling in e-Statements can be done by the member within **It's Me 247** or it can be done by the credit union staff members through Member Personal Banker. Your eventual message to members can include both of these options. In addition to marketing the security and ease of access for e-Statements, it may also be of interest to provide a benefit to members for enrolling in e-Statements. For example, you could provide a \$0.25 benefit to members each month for being enrolled in e-Statements. This is a great way to share the cooperative spirit with your members and promote how as an owner of the cooperative they are receiving benefits.

Generating the List for Member Connect

The list of members to communicate with is created based upon the name that is provided within the *output to database file* field.

Note: Selecting to Export the record for Query will create a database file with the information seen on the screen and all records will be included. Selecting to Export to Member Connect will create a file that includes only Account Base and will eliminate any duplicate records (preventing you from calling the same member twice for a single campaign).

What Do I Do with the List?

Once you've created your database file, select the **Member Connect** button on the screen. From here, you will have a variety of options depending on the resources available to you, and the method you choose to use to market to these individuals. Start by entering your newly created file in the *File name* field.

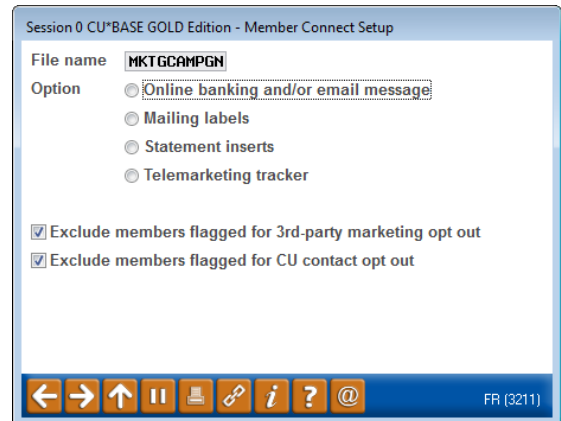
Sending an Electronic Communication

1. Enter the name of the database file created in the previous step. (This must have been stored in your credit union's QUERYxx library.)
2. Click the "Online banking and/or email message" button and press enter to continue.
3. Here you have several creation/selection options:
 - If you have performed this campaign before and have already saved a message for this campaign, select the message and select the *Send* button. Go to Step 8.

OR

 - If this is the first time you are performing this particular campaign, select *Create* (F6).
4. Enter a two-digit *Message type*; this must be a letter and a number or two numbers—two letters are reserved for messages from the Master Message Library.
5. Enter the *Message subject* "**Get Cash for e-Statements!**" This text will appear in the subject line when the message is sent as an email message. Enter to continue.
6. Now you are on Member Connect Message Maintenance screen. Here you can enter or edit the text of the message. Enter your text as follows:

Enrolling in e-Statements is simple. Simply log on to It's Me 247 and enroll today. As an owner of the credit union, you will receive \$0.25 each time an e-Statement is generated for you. Getting a quarter every month and having your e-Statement electronically delivered to you via It's Me 247 has never been easier.
7. Select Save Changes.
8. Now you are ready to send the email or **It's Me 247** online banking message. Select the message and click the Send option.
 - **IMPORTANT:** All email messages will have the Signature Line message (SL message) text automatically appended to them. Editing the Signature Line or (SL message) is similar to editing a message. *SEE ALSO:* [Editing the Signature Line \(or SL Message\)](#).
 - **TIP:** In your Signature Line, you may want to include text explaining how a member can "opt out" of receiving future marketing email messages. This can be done by having them "opt out" using the two options on the Info Center|Contact Preferences page in **It's Me 247**.
9. Select to send the message via *Priority*. This will send the message to members with email addresses first, and then to members with online banking accounts without email addresses. Set a comment purge date one month out from the current date.



10. Click *Send* (F5).

- NOTE: Online banking messages will only be sent to members who have already logged into online banking.

11. Press Enter to confirm your sending.

Creating a Call Campaign

Prior to initiating a call campaign, you will need to ensure that the proper cross sales configurations have been set up.

Configuring Cross Sales

In order to use the Member Connect tool to create a sales tracker for a telemarketing campaign, you must first complete the following steps:

1. Create a Cross Sales Tracking Need Group for the campaign
2. Set up the tasks associated with the Need Group

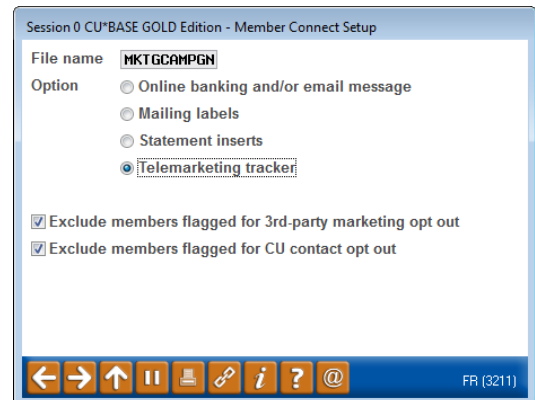
These can be configured in **Configure Cross Selling Tools** on the Member Tracker Tools (MNTRAK) menu. Check out the [Cross-Selling Credit Union Services & Next Suggested Product](#) booklet for more information.

Using Member Connect to Create a Telemarketing Tracker

Once the cross sales need group and tasks have been set up, you can use Member Connect to create a telemarketing tracker for the purposes of a call campaign.

You can get to the Member Connect tools via the Member Communication (MNPRTC) menu as well as through the Credit Report Data Mining tool.

Enter the file name created, select *Telemarketing tracker* and press Enter to continue.



This will bring you to the “Generate Trackers from Database File” screen. From this screen, you’ll be able to set the details for the sales tracker that will be created on the member record.

Create as tracker type: ST – Sales Tracker

Create as memo type: IN – Initiate

Tracker key word: “estatements”

Tracker follow-up date: Enter the date by which the first round of calls should be made.

Tracker text: *Member is not enrolled in e-Statements. Talk with this member today about enrolling!*

Tip: Cross sales tasks can be configured with tips, which could include the call script.

Assign telemarketer ID: Enter the ID of the individual who will be making the calls.

Tip: Too many records for one person? Assign the follow-ups to a generic employee ID that multiple people can work off.

Assign cross sales need group: Self Service Products

Assign cross sales task #: E-Statements

Check the boxes for excluding members that are opted out.

Once the information has been entered on this screen, you will go to a final confirmation screen that will also print a report of the members for which a new tracker was created. They are now ready to be worked!

Working the Cross Sales and Completing the Call

Once the trackers have been created, calls can be initiated either from Work Follow-ups or from the Cross Sales screen for that member. (You can use the report that was generated when creating the trackers to go through the list.)

In “Work With Follow-ups” select a record and click on *Cross Sales*. Here you will see the Cross Sales task that was set-up and that can be worked.

Cross Sales Tasks				
Account base	<input type="text" value="ROBERT"/>			
Credit score	617			
Filter by need group	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Filter by task	<input type="checkbox"/>
Need Group	Task	LT	Last Memo Type	# Conv
30 L-Z	05 Loan Steats	ST	IN Initiate	1

Once the call has been made, record the conversation based on the results of the call.

Call Script

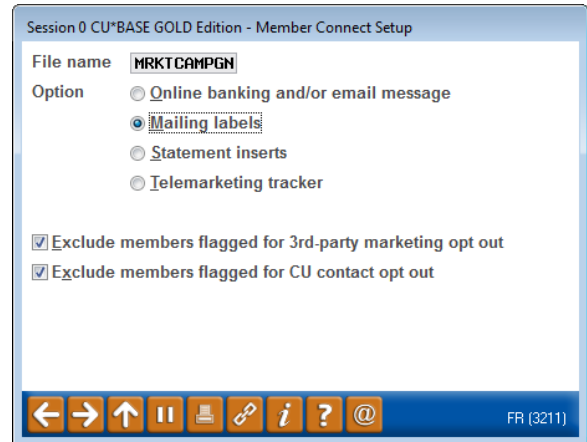
Work in progress.

Sending a Mailing or Selective Statement Insert

To market to the member via a mailing, you have the option of either creating mailing labels or to create a file for selective statement inserts.

Creating Mailing Labels

From the Member Connect Setup screen, enter the File name that was created in the Credit Report Data Mining menu option and select *Mailing Labels*. This will take you to the Member List Generator to include further exclusions as desired. Since you have already generated the list you want, you can enter through the List Generator screens to choose your label size and print them.



Selective Statement Inserts

If you would prefer to add a statement insert, selecting the *Statement inserts* option will take you to a window that will let you designate which selective insert you will be setting up. This step simply copies the database file from your QUERYxx library to your FILExx library, giving the file the appropriate STMT## file name so that it will work with the selective inserts system. Select *Process* (F5) to continue to the statement setup screens.

Refer to the [Selective Marketing through Printed Statements](#) booklet for more information.

How Do I Follow Up and See My Results?

There are a couple of options for you to track the success of your e-Statement campaign. The following are some of the favorites;

1. Review the Tiered Services Monthly Comparison (MNMGM) and review the past few months and look for an increased number of e-Statement members within Goal 4.
2. If a Telemarketing Tracker was utilized, use the Cross Sales Analysis Report (MNTRAK) to review how many of the initial tracker conversations generated ended with a sale.
 - a. Choose to sort by Ending Point Employee to provide your team with an analysis of who closed the most deals...