

# Building the Factory

## I WANT TO INCREASE MY NUMBER OF SERVICES PER MEMBER

Find out how to  
**CONTACT NEW MEMBERS  
TO MARKET  
PRODUCTS!**

**DON'T HAVE THE TIME  
OR MANPOWER?**

**Xtend** can do it  
for you!



*Simple DIY  
Instructions  
Inside!*

# Building the Factory

## Vol. 11: New Member Outreach

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 sale's success.

## What is the Campaign?

Contact new members who have joined the credit union. Why should you do this? This is a great opportunity to welcome them to the credit union and manufacture opportunity for credit union. Let the member know the full spectrum of services you offer. It's possible they don't even know what is available to them. You could piggyback this member interaction with other Building the Factory volumes and offer to refinance their auto loan, credit cards or mortgage. It is an opportunity to generate revenue and to create a lifelong member. Reaffirm their choice to join the credit union!

## How Do I Find the Target Group?

This campaign can be started by using the **New/Closed Memberships** tool in the Management Analysis Dashboards (MNMGM) menu.

## Entering the Selection Criteria

**From Date:** Use the last full month. For example, if it is currently March 14, use February for your selection criteria. This will make it easier to track your campaign efforts and prevent overlapping in future campaigns.

**Status:** Open

**Gender:** Both

## Other Considerations

Depending on the membership designations that your credit union offers, you may wish to have a different welcome message to individual members versus business members.

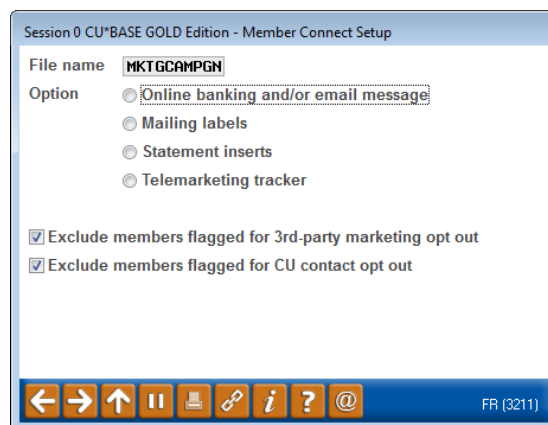
## Generating the List for Member Connect

Once you've narrowed down your list of records to only those you want to contact, select the **Export** button. Select to export the selection of accounts for Member Connect. Enter a file name; this will create a database file in your QUERYxx library.

**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* "**Welcome!**" 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:

**We at \_\_\_\_\_ Credit Union would like to thank you for joining the credit union. The cooperative spirit is alive and well, and we look forward to serving you. Contact us with any questions.**
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

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 “Telemarketing Tracker” button and press enter to continue.
3. Ensure that Create as Tracker Type is set to ST (Sales Tracker)
4. Choose a memo type of IN for Initiated
5. Choose a tracker key word of “Sales Tracker”

**Warning!** If you enter a Tracker Key word that is different from an existing Tracker Type, you will create a new Tracker. This will not, for example, be appended to the member's Sales Tracker. It is recommended that you enter Sales Tracker here.

6. Choose a follow-up date of today.
7. Check the box for “Append to Existing Tracker”
8. Enter the tracker text as follows...
  - **Member recently joined the credit union, welcome them and make them aware of our current promotions!**
9. Choose a telemarketer ID of the employee who is generating the leads
  - A pseudo-employee id could be created if you want the effort to be established without a physical employee id.
10. Choose a need group of \_\_\_\_\_ depending on your Cross Sales configuration
11. Choose a task of \_\_\_\_\_ depending on your Cross Sales configuration
12. Check the boxes for excluding members that are opted out.
13. Coach your team on reviewing the “Follow-Ups” badge within the member inquiry screens.

## Sending a Selective Statement Insert

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 "Statement Inserts" button and press enter to continue
3. Enter the Statement File ID number you wish to use
  - a. Depending on how many selective statement inserts are used in the month desired, you may need to change the ID number listed.
4. Check the boxes for excluding members that are opted out.
5. Click on "Process"
6. Choose the Statement Format ID that the insert will be used for
7. Hit ENTER through the statement messages
8. Based on the number chosen in step 3, reference the file name of STMTxx (where xx = the file id number chosen) and enter a description of the insert and make selections for "Leftover Pieces" and choose "Selective"
9. Press Enter to save and follow standard procedures for getting insert to your statement provider

## How Do I Follow Up and See My Results?

Depending on the nature of your new member campaign (whether or not you are marketing a specific product or service) the **New/Closed Membership Dashboard** can be used to analyze specific penetration within a group of members that have a consistent open date range. For example, if you look at all members who opened their membership in March, but it is actually the month of July, you can verify the increase in participation over time.

If a Telemarketing Tracker was utilized, use the **Cross Sales Analysis Report** available from the Member Tracker Tools (MNTRAK) menu to review how many of the initial tracker conversations generated ended with a sale. You can choose to sort by Ending Point Employee to provide your team with an analysis of who closed the most deals.

## Campaign Form



Don't have time to complete this or another campaign yourself? Let Xtend do the work for you. Assuring we meet and exceed your expectations is very important to us. The information below will be utilized for quality assurance purposes. This form serves as your formal written consent for Xtend to deliver messages using the CU\*BASE Member Connect Program on your behalf. Once completed please return to the Business Support Representative Team via email to [info@xtendcu.com](mailto:info@xtendcu.com)

☐ I agree to all of the terms & conditions of this Member Connect message request, as specified above.

<b>Credit Union Name</b>		<b>Date Submitted</b>	
<b>CU #</b>		<b>Employee Name</b>	
<b>CU ID</b>		<b>Email Address</b>	

<b>Campaign Topic</b>	_____ (Example: Auto Loans)
<b>Campaign Date</b> (Preferred Option week - 1)	Week of _____
<b>Campaign Date</b> (Preferred Option week - 2)	Week of _____

## Form of Outbound Communication

Outbound Calls	<input type="checkbox"/> Yes <input type="checkbox"/> No	<b>It's Me 247</b> Online Banking Secure Message	<input type="checkbox"/> Yes <input type="checkbox"/> No
Email Message	<input type="checkbox"/> Yes <input type="checkbox"/> No	Lobby Banners	<input type="checkbox"/> Yes <input type="checkbox"/> No
OBC Post (only available for Member Reach clients)	<input type="checkbox"/> Yes <input type="checkbox"/> No	Mailer	<input type="checkbox"/> Yes <input type="checkbox"/> No



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