

# Building the Factory

## I WANT TO INCREASE MORTGAGE LOAN BALANCES

Find out how to  
**CONTACT MEMBERS  
WITH AN LTV  
OF YOUR CHOICE!**

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

**Xtend** can do it  
for you!

*Simple DIY  
Instructions  
Inside!*

# Building the Factory

## Vol. 17: Loan-to-Value Report Data Mining

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.

### Opportunity Analysis

The snapshot below is an overall second mortgage or refinance opportunity for one credit union. The number of individuals and dollar amounts below represent an analysis of current first mortgages with a Loan to Value of 60% or less. From the data below we can see that this credit union has a potential to capture over 33 million dollars in refinance or second mortgage dollars by taking the (combined) loan-to-value to 80%!

Credit Union	
Number of first mortgages	585
Estimated Value	\$ 87,271,907.00
Current Balances	\$ 36,260,006.01
80% of Value	\$ 69,817,525.60
<b>Total Opportunity</b>	<b>\$ 33,557,519.59</b>

These individuals have already been through your doors and have a current mortgage relationship with your institution. Do not miss out on this money making opportunity! What are you going to do to capture these loan opportunities? You have two options.

1. You can take it upon yourself and follow the step by step instructions in the subsequent pages.

-OR-

2. You can contact Xtend at 800-327-3478 or [info@xtendcu.com](mailto:info@xtendcu.com) and they will handle everything for you.

## What is the Campaign?

Contact current members with a current first mortgage with your institution. Note: In this sample, members have been selected whose loan-to-value on their mortgage is at 60% or below, so that there is an opportunity to offer them a second mortgage or cash-out refinance for a substantial amount while still keeping their new loan-to-value at 80% or lower. This will unlock the equity in their home for home improvements, college tuition and so on.

## How Do I Find the Target Group?

1. Begin by accessing the Reports (E) menu or MNRPTE.
2. Select **Loan-to-Value Analysis Report**

This report shows loan-to-value ratios on your loans accounts. It will calculate loan-to-value (LTV) figures based on current and original balance. In addition, for real estate collateral types, the report will calculate combined loan-to-value (CLTV) figures based on other debts.

### Entering the Selection Criteria

1. **Loan Category:** Select all of your first mortgage loan categories.
2. **Loan open dates:** Leave this blank, so the report will reflect all current open mortgage accounts. Remember, even if the first mortgage has recently been opened, there is an opportunity to offer a second mortgage
3. **Include written off loans:** Uncheck
4. **Collateral definition type:** Real Estate
5. **Include loans with LTV %:** From 1.00% to 60.00%
6. **Based upon:** Current loan balance
7. **Include only real estate loans that have other debts (for CLTV calc):** Leave unchecked

## Loan To Value Report

Loan Details		Collateral	
Business unit	Select	Optional	Collateral definition type <input checked="" type="checkbox"/> Real estate <input type="checkbox"/> Stock <input type="checkbox"/> Vehicle
Loan category	Select 14 selected	Optional	<input type="checkbox"/> Other <input type="checkbox"/> Medallion
Loan open dates	From 00000000 [MMDDYYYY]		Include loans with LTV % From 1.00 %
	To 00000000 [MMDDYYYY]		To 60.00 %
<input checked="" type="checkbox"/> Include written off loans		Based on <input type="radio"/> Original loan balance <input checked="" type="radio"/> Current loan balance	
		<input checked="" type="checkbox"/> Include only real estate loans that have other debts (for CLTV calc)	
Escrow		Report Options	
Type	Select	Optional	Sort by LTV
Payee code	Select	Optional	<input checked="" type="checkbox"/> Export detail to file
		<input checked="" type="checkbox"/> Job queue Copies 1 Printer P1	

Session 2 CU\*BASE GOLD Edition - Export

Export selection ☒ Accounts for Member Connect  
☐ Account detail for query

FR (1121)

FR (3267) 8/06/14

## Other Considerations

You could expand the range of LTVs to a higher percentage than 60%. This will increase the number of potential members to reach out to, however the dollar amount of the potential funds to the borrower could be less.

As an example, on a property with an estimated value of \$150,000 and a current LTV of 70%, the available equity is still \$15,000 at a new (combined) Loan-to-Value of 80%.

## Generating the List for Member Connect

Once you 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

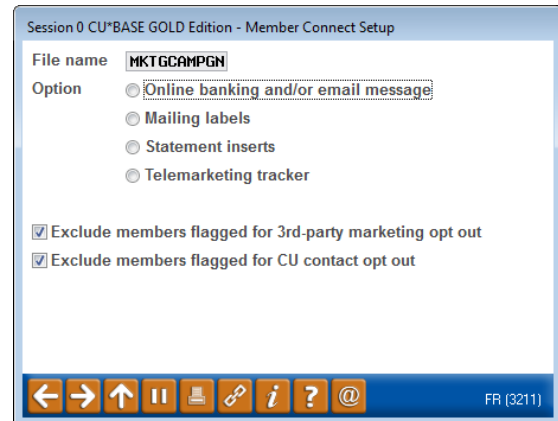
1. Enter the name of the database file created in the previous step. (This must have been stored in your credit union's QUERYxx library.)
2. Click the "Online banking and/or email message" button and press enter to continue.
3. Here you have several creation/selection options:
  - If you have performed 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* "**Unlock the Equity in your Home**" 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 appreciate your current mortgage business with \_\_\_\_\_ Credit Union. We want to make sure we continue to meet all of your financial needs. You may have valuable equity in your home, and we can help you unlock it. To find out more, call us at (\_\_\_\_) \_\_\_\_-\_\_\_\_ or visit us online at \_\_\_\_\_.**

**Thank you for being a member of \_\_\_\_\_ Credit Union!**
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.

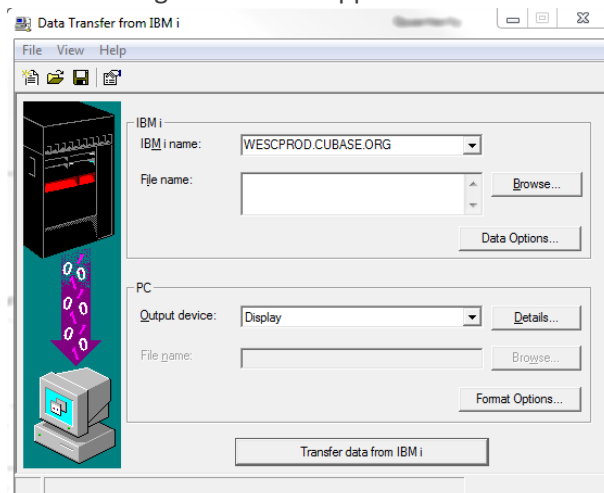
## HTML Email


If you chose to send your message in HTML you can do so by following the steps below. Note: you should never download account numbers. Whatever you send out of CU\*BASE, you will want to bring that information back into CU\*Base. For example, opt out and returned emails.

## Download File

After running the applicable queries, follow the steps below:

1. Speed Sequence - MNFILE
  - a. Press enter
2. Option - 1 – File Download (iSeries to PC)
3. The following window will appear:





4. In the IBM i name field type the following:
  - a. PROD → WESCPROD.CUBASE.ORG
  - b. Site Four → PROD.SITE-FOUR.COM
    - i. In the File Name field type QUERYXX/MBRRXXXX#
      1. MKTGCMPPGN
5. Click the properties icon → 
  - a. Check box for "Convert CCSID 65535"
    - i. Click "Apply"
    - ii. Click "OK"
6. Next to "File Name" field click "Browse" button
7. In the "Output device" field under the drop down, select "File"

- a. Save
    - i. Name File in the following format
    - ii. File name + MM/DD, for this example; MKTGCAMPGN+Date
8. Click 'Transfer Data from IBM i'
  - a. If PROD, use your CU\*BASE login credentials
  - b. If Site Four, use the XTENDMR login credentials


## Converting File

Prior to uploading your file to the HTML platform you must convert the file to a .CSV file. The steps below will show you how to convert your file. .

1. Open new Excel document
2. File - Open - Browse for Appropriate file with NO DESIGNATED File Type

 DA Nmbr 3.12	3/12/2014 4:02 PM	12 File	3 KB
 DA Nmbr 3	3/12/2014 4:02 PM	Adobe Acrobat Fo...	1 KB

3. File - Save As - Save Document as .CSV
  - a. Will be labeled as CSV (Comma Delimited)
  - b. Save your file with a name that is standard and includes the date the report was run, for example:
  - c. Before continuing, open your file and verify that your file only contains email addresses and NO account numbers have been downloaded.

 DA Nmbr 3-12	3/12/2014 4:18 PM	Microsoft Excel Comma Separated Values File	2 KB
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## Sending From Your Preferred HTML Vendor

You will need to log into your HTML platform and upload your list of members to contact.

1. Select "List" at the top of the screen, then "New" from the dropdown.
  - a. Agree to the terms and conditions
2. Name your list and place a brief description of the target audience
3. Select "Create a new list from an external file."
4. Click on "Choose File"
  - a. You will then need to locate and link the .CSV file you downloaded from CU\*Base
5. Once your file is linked hit the "Next" button.

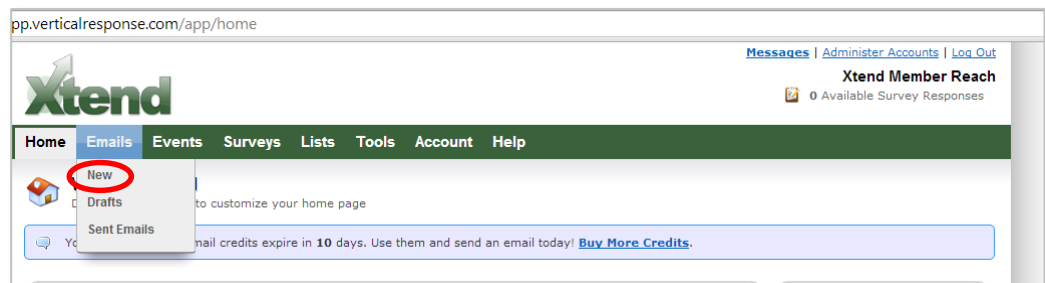


6. From here you have uploaded your list, named it and it is ready to marry with your message and send to your members.
  - a. Tip: Be sure to verify that the # of member's and the # of email addresses uploaded are the same.

## Creating & Sending Your Email

At this point you are now ready to upload your list to the HTML user platform, create your email and send it to your audience.

1. Hover your mouse over "Emails".
  - b. Click on "New"



2. From this screen you see that it is fairly strait forward. Create the:
  - a. 'Name'
  - b. 'From label'
  - c. 'Subject Line'



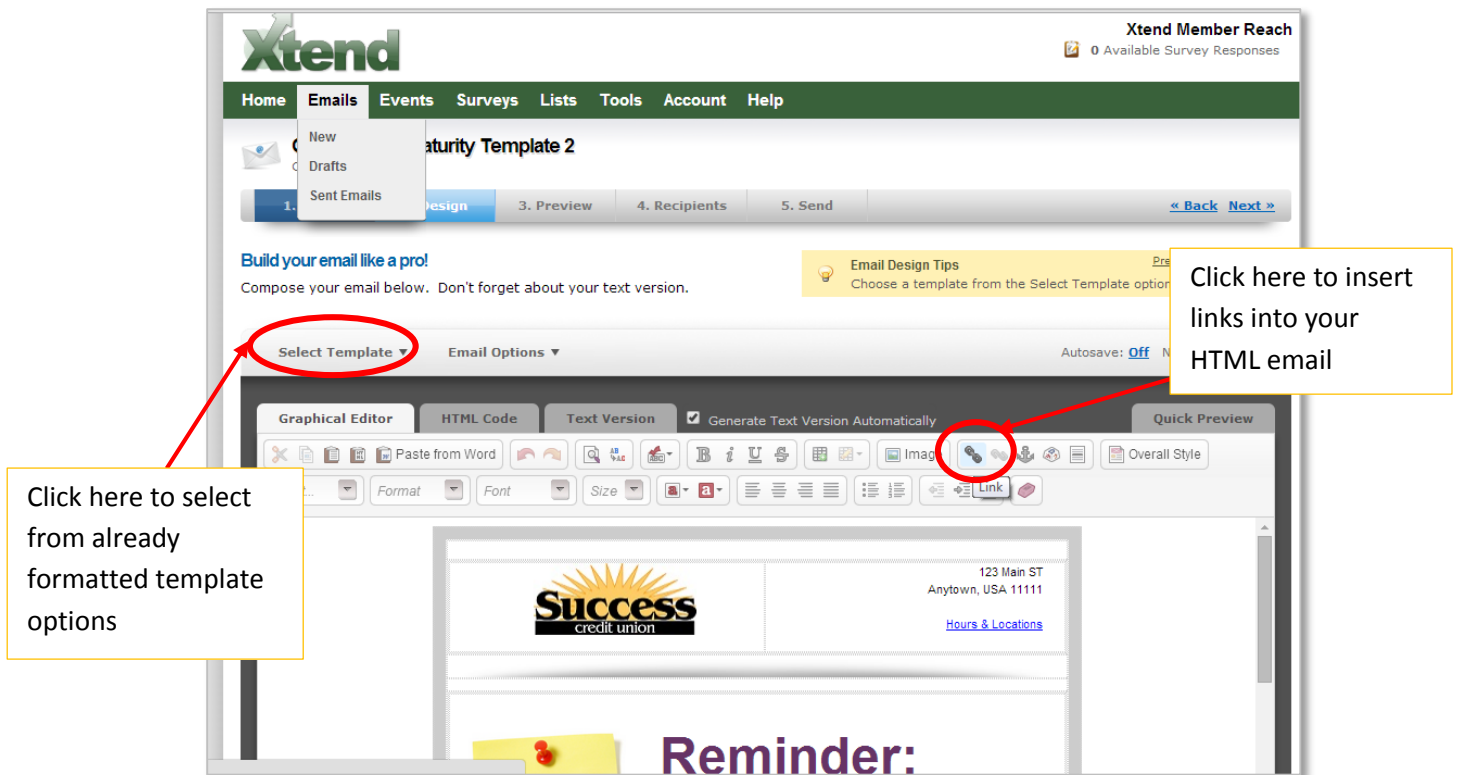
- d. Name the email, be sure to use a standard name, such as “Campaign + Send Date”
- e. Subject line – chose something that will grab your readers attention

The screenshot shows the Xtend Member Reach email setup interface. At the top, there's a navigation bar with links for Messages, Administer Accounts, and Log Out. Below this is a green header with the Xtend logo and a menu with Home, Emails, Events, Surveys, Lists, Tools, Account, and Help. The main content area is titled "Email from 07/28/2014 05:23PM" and "New Email". It features a progress bar with steps: 1. Set Up (active), 2. Design, 3. Preview, 4. Recipients, 5. Send, and a Next button. The "Get Started" section prompts the user to begin by typing a Name for their new email, with a text input field containing "Email from 07/28/2014 05:23PM" and a note that this is for reference only. The "Email Settings" section asks the user to type their email's From Label and Subject Line. The From Label field contains "Xtend Member Reach". The Subject Line field is empty, with a note indicating 0 characters and a recommendation to keep subject lines under 40-50 characters. A compliance notice states that the email must include an unsubscribe option and a valid postal address. The Unsubscribe Info field contains a text input with the instruction: "If you no longer wish to receive these emails, please reply to this message with 'Unsubscribe' in the".

- f. Check the unsubscribe language and confirm your reply to email address.
3. Click “Next”

This screenshot shows the final steps of the email setup process. The From Label field still contains "Xtend Member Reach". The Subject Line field is empty, with a red warning message "Subject cannot be blank" and a tip icon. A note indicates 0 characters and a recommendation to keep subject lines under 40-50 characters. The compliance notice remains. The Unsubscribe Info field now shows a text input with the instruction: "If you no longer wish to receive these emails, please reply to this message with 'Unsubscribe' in the subject line or simply click on the following link:", followed by a link labeled "Unsubscribe" and a "Change" link below it. The Postal Address field contains a text input with the address: "Xtend Member Reach, 6000 28th Street SE, Grand Rapids, Michigan 49546, US", with a "Change" link below it. The Reply-to Email field contains a text input with the email address "info@xtendcu.com" and a note that all replies will be sent to this address. At the bottom, there are "Cancel" and "Next »" buttons.

4. Choose your email template by clicking on “Select Template”. There should be several theme’s and templates pre-populated for you to choose from and modify. You can also write the HTML code write in your HTML platform.
5. Be sure to include links in your email to inspire action in your members. You want to drive the member to a page that allows them to interact with you. For instance, if you are trying to get them to apply for a loan, you should link them to the page on your web site that allows them to apply for a loan online.



6. Once you have your email created, including your credit union logo, verbiage and links, hit “Next”.
7. You must now test the HTML email.
  - a. Preview the email in HTML
  - b. Preview the email in Text

app.verticaireponse.com/app/emails/builder/index/593003561?page=build#/593003561/test

**Xtend** Messages | Administer Accounts | Log Out  
Xtend Member Reach  
0 Available Survey Responses

Home Emails Events Surveys Lists Tools Account Help

**CD Reaching Maturity Template 2**  
Canvas Email

1. Set Up 2. Design 3. Preview 4. Recipients 5. Send « Back Next »

**Preview and Test**  
Before sending your email, look it over and send yourself a test.

**Email Testing Tips**  
Create a seed list to send a test email to yourself or associates. [+] [Previous Tip](#) [Next Tip](#)


\* Preview Email: Preview both versions of your email before sending. Click **Preview Text** to see your text version.

1. **Preview HTML** Done

2. **Preview Text** Not Done

**From:** Xtend Member Reach  
**Subject:** Your Membership Matters!

[Download PDF](#) | [Open in New Window](#)

 123 Main ST  
Anytown, USA 11111  
[Hours & Locations](#)

- c. Then, send yourself a test copy of the email.
- Enter your email address
  - Hit “Save” right below the email address
  - Hit “Send Test Email”

If you no longer wish to receive these emails, please reply to this message with “Unsubscribe” in the subject line or simply click on the following link: [Unsubscribe](#)

Xtend Member Reach  
6000 28th Street SE  
Grand Rapids, Michigan 49548  
US

\* Send a Test: Send a pre-launch test email to yourself or a coworker using one of the list options below.

**Which type of list would you like to use?**

☒ Simple Lists [➡](#) Send to a list of just email addresses (no merge fields).

☐ Mailing Lists [➡](#) Send to an existing mailing list. Test with standard and custom merge fields.

Default List ▼

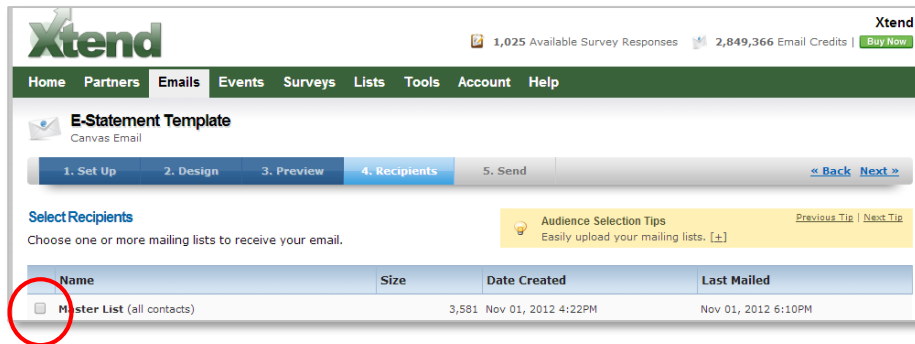
[Add List](#) [Delete List](#) [Rename List](#)

[Add More](#) [Save](#) [Cancel](#)

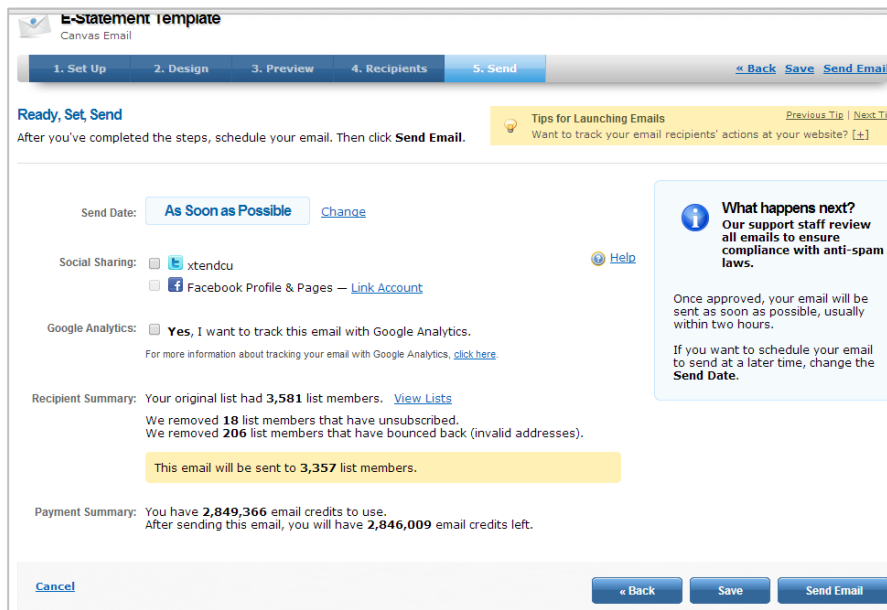
3. **Send Test Email** Done

[Cancel](#) « Back Next »

8. Preview your test email and review to be sure:
  - a. Your links all work
  - b. You text is free of errors
  - c. The look is what you want
  - d. If you need to fix the email click the “Back” button, make the revisions and repeat the steps above again.
9. Your email is ready to roll! Click the “Next” button.
10. Select the mailing list you created for this marketing email and hit next.

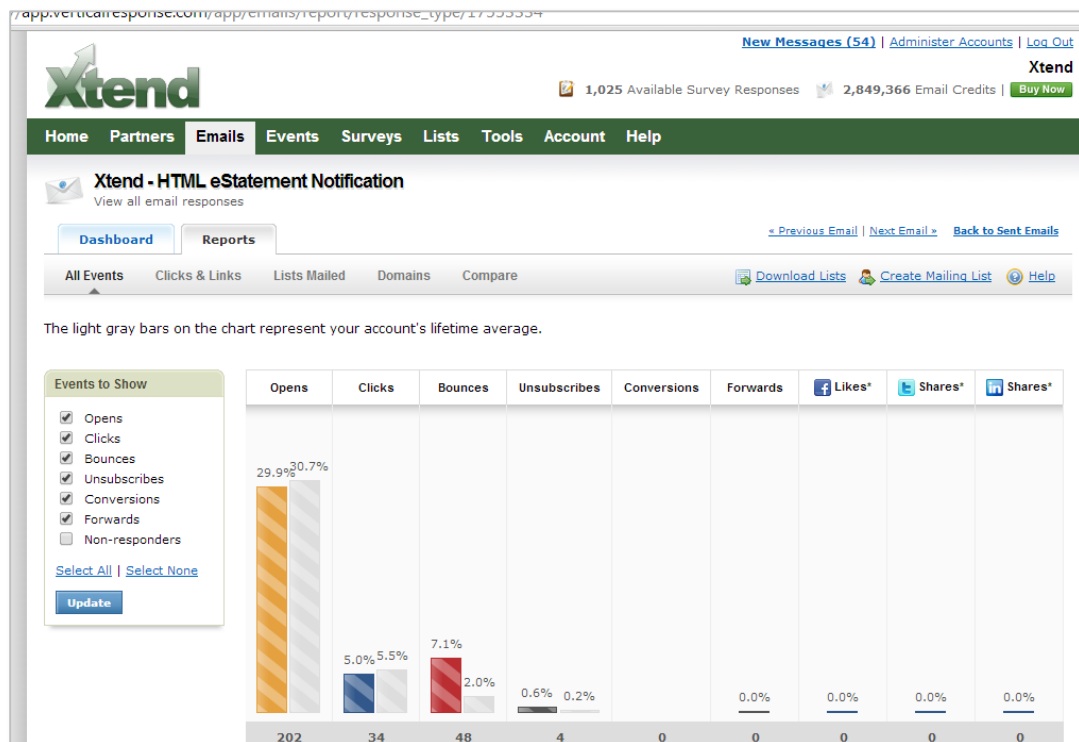


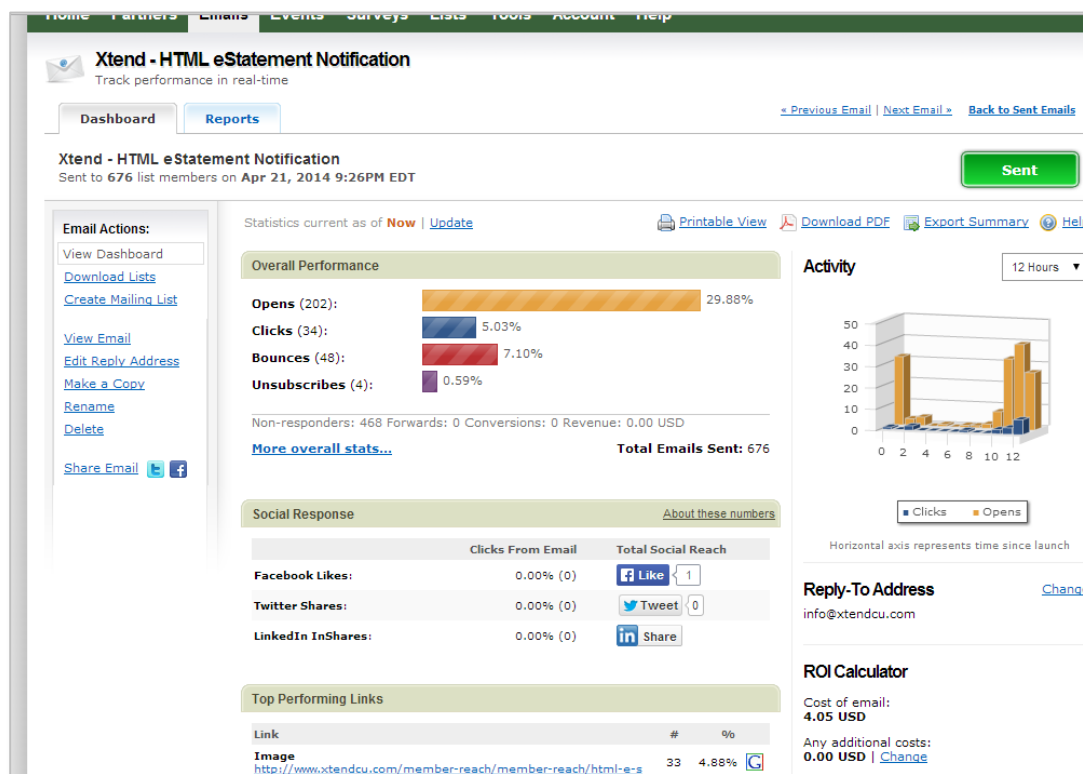
11. From this screen you will want to:
  - a. Select the date and time you would like the email to send
  - b. If you would like to link the email to your social media feeds, check the boxes for the social media you would like to post the information to
  - c. If you would like to track the email using your Google Analytics, check the option next to the Google Analytics box
  - d. Ready? Hit “Send Email”!



## Reporting

The great thing about HTML platforms is the reporting features. When a member receives the email and clicks to open the email, it is tracked in our reports. The same is true if the member clicks on a link within the email. The “click through” rate is documented. We can map the member’s patterns and interests by using the reports. There is even an ROI calculator within the platform. Even more exciting is that you know **who** clicked on the link or opened the email. The reports provide you with the email address of the members who clicked to receive more information, such as a member who clicked to view more information regarding a car loan rate, or members who wanted to read more about a broker program. You can even track members who share the message on social networking sites. Entire campaigns can be generated around these reports. Below are examples of reports. All reports can be exported to excel or pdf.





## Processing Unsubscribe Requests

You are not quite done yet. You will receive unsubscribe requests from your members from this point forward. Expect approximately 7% of your entire membership to opt out of member marketing. Below is the process you will follow and must continue to monitor in order to stay compliance. This process is our unsubscribe process, it is to unsubscribe all members who choose to opt out or unsubscribe from these messages. This process is exactly the same when using an HTML platform, you just collect the member opt out list from your available reports in the HTML platform.

Something to note: Some messages will never be opted out of. For instants, eStatement notifications will always be delivered to a member, whether they opt out or not.

1. Open CU\*BASE
2. MNUPDT → #14





marketing. However, CU\*Base does not store a permanent log of the above process for longer than 3 months. Therefore you must place a tracker on the members account so you have a permanent audit trail on the account. This is extremely important for auditing purposes. It is also valuable for credit unions who choose to call the members who have opted out of marketing information to confirm that this was, in fact, the member's intention. Continue on.....

8. Go back to the main menu screen.
9. F2 for Phone Operator.
10. Enter member who you just opted out's Account Number.
  - a. If there was more than one name that was associated with the email address you can repeat steps 9 – 11 and select 3<sup>rd</sup> party opt out box. No further tracking for 3<sup>rd</sup> party opt-out.
  - b. If there are more than one email addresses per credit union back up to Email Address Reverse Lookup screen and just copy and paste the next address and repeat.
11. Highlight the Select Primary Savings Account/Share Savings (000), then select "Inquiry" at the bottom of the screen.
12. Select "Tracker Review" (on left hand side of menu).
13. If there is an existent Sales Tracker (ST) highlight it and hit the "update" option.
14. If no sales tracker, Tracker Entry on left hand side of menu
15. Key word/phrase: Sales Tracker
16. Tracker Type: (CU Specific)
17. Enter
18. Memo Type: (CU Specific)
19. Enter: Member requests to unsubscribe from email contact. Please verify their request.
20. Hit F5
21. Follow-up date: Current date
22. Need Group: (Cu Specific)
23. Task # (CU Specific)
24. Person to call back: Unsubscribe Tracker Employee ID

## Reporting Tools Available 24/7

CU\*BASE provides a report 24 hours after the Member Reach message has been sent, as well as an end of month report. These reports can be used at board meetings. Follow these steps to access your report in CU\*Spy:

- 1) Login to CU\*BASE
- 2) Hit ESC on your keyboard
- 3) Select Option 4 "CU\*Spy Daily Reports".
- 4) Enter the report name: Daily Report: PCMMMSG Monthly Report: PMBRSUM
- 5) Select a date range: For example: 03/03/2014 - 03/24/2014
  - a. Monthly reports are typically available between the 1st through the 4th of the month
- 6) Hit the Search Button Select the Report Scroll to the bottom of the report

## 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

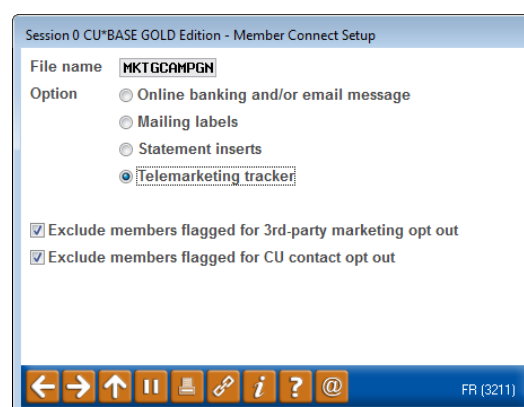
These can be configured in **Configure Cross Selling Tools** on the Member Tracker Tools (MNTRAK) menu. Check out the [Cross-Selling Credit Union Services & Next Suggested Product](#) booklet for more information.

## 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:** “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.

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

**Tracker text:** Talk with this member about a second mortgage!

**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: \_\_\_\_

Assign cross sales task #: \_\_\_\_

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  ROBERT

Credit score 617

Filter by need group ☐ 

Filter by task ☐ 

Need Group	Task	LT	Last Memo Type	# Conv
30 L-Z	05 Loan Steals	ST	IN Initiate	1

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

## Call Script

The call script for this campaign should focus upon making the member aware of the additional equity they have in their home. Depending on the timing of the campaign, emphasize potential purposes for the available funds, such as home improvement (building even more value into the home and maximizing the home’s potential), college tuition (alternative for higher interest rate student loans). Make sure to create awareness with the member of the solutions their credit union can offer, whether it is a home equity line of credit, a fixed rate second mortgage or perhaps a cash-out refinance of the first mortgage.

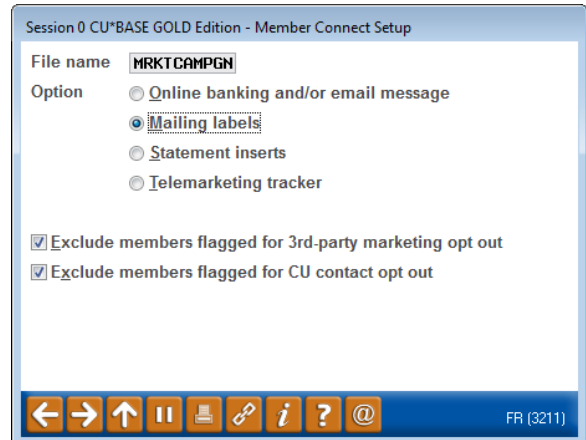
***Hello Mr/Mrs. \_\_\_\_\_. We are contacting you to you today to tell you about our great home equity products. Are you aware of potential equity in your home? A home equity loan is a great way to pay for things such as a remodel, a wedding, school tuition or other big life events. We have multiple loan products that we can match to your needs. We are your financial partner and want to ensure we do everything possible to meet your needs.***

## 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.



The screenshot shows a software window titled "Session 0 CU\*BASE GOLD Edition - Member Connect Setup". Inside, the "File name" field contains "MRKTCAMPGN". Under the "Option" section, four radio buttons are listed: "Online banking and/or email message", "Mailing labels" (which is selected), "Statement inserts", and "Telemarketing tracker". Below this, two checkboxes are checked: "Exclude members flagged for 3rd-party marketing opt out" and "Exclude members flagged for CU contact opt out". At the bottom, there is a row of navigation icons (back, forward, up, down, print, link, info, help, and email) and a status indicator "FR (3211)".

### 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?

Our recommendation is to run this report twice a year, and time the associated marketing campaign to coincide with a suggested purpose for the available funds. Think early spring for a campaign geared towards home improvement, and early fall aimed at education expenses.

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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