



Pricing Guide

2022 fiscal year
updated 10/1/2021



Contents



about us 4

contact center 6

communications 8

bookkeeping 12

data analytics 14

partner services 18

professional services 19

Introduction

Xtend is a **Credit Union Service Organization** founded in 2002 in Grand Rapids, MI.

Collectively owned by our clients, we act as a shared resource for credit unions across the country. This structure allows us to offer high-quality service at prices accessible to organizations of all sizes.

Xtend has four departments:

Contact Center, Communications, Bookkeeping and Data Analytics.

We work together to help credit unions reach their goals.

Prices listed in this guide are updated annually, at the start of Xtend fiscal year, which begins in October. If your credit union currently uses a recurring product or service, your pricing will not update until January 2022, after which it will match this guide unless otherwise discussed.

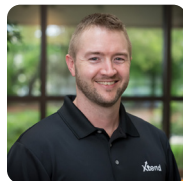
We value your feedback on our offerings, pricing, and decision-making! We'll work hard to exceed your expectations.

For more detailed info about our products and services, please contact us at (866) 981-4983 or at info@xtendcu.com.



Liz Wwinner

President & CEO
Xtend



Jason Conrad

VP of Business Development
Xtend Contact Center



Jalyn Lindeman

VP of Communications
Xtend Communications



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VP of Accounting
Xtend Bookkeeping



Sarah Ashby

Business Intelligence Manager
Xtend Data Analytics

Xtend Board of Directors



Geoff Johnson

CEO
CU* Answers



Carma Peters

President & CEO
Michigan Legacy CU



Mark Richter

President & CEO
First United CU



Mike Barr

President & CEO
Commodore Perry FCU



Vickie Schmitzer

CEO
Frankenmuth CU



Jim Miles

CEO
My USA CU



Michael Abraham

President & CEO
First Financial CU



Chuck Papenfus

CEO
Inland Valley FCU



Steve Cobb

President & CEO
BlueOx CU

Our **Board of Directors** consists of nine credit union executives working together to help their peers stay relevant in an increasingly competitive marketplace.

Contact Center



Product / Service

One-time fee

Ongoing fees

Branch XT

Inbound member service provided during Contact Center business hours, including returned voicemail calls to members. Call coverage includes overflow calls, after-hours calls and more.

\$1500*

\$75 / month
\$2.75 / call

Core Direct

Inbound loan lead hotline. We begin the application process by feeding them directly into your CU*BASE loan pipeline.

\$1500*

Starting at **\$75 / month**
\$2.75 / call
\$3.50 / application
\$5.00 / booked loan

Web Chat

Web chat within It'sMe247 and/or your website, with interactions handled by Contact Center agents. Outbound calls are made when members require advanced authentication for support.

\$1500*

\$50 / month
\$2.50 / chat
\$2.50 / outbound call

Branch ST Outbound Calls

Outbound calls made to members in over 13 different targeted audiences, based on a pre-defined schedule of activities.

\$1500*

\$75 / month for our six core audiences
\$2.50 / call

Branch ST Self-Service

Weekly call lists for your outbound campaigns, so you can call members yourself.

\$1500*

\$75 / month

Disaster Recovery Support

Inbound member service to provide top-notch service during significant branch outages.

\$1500*

\$45 / month retainer
\$4.00 / call
\$3500 / declaration
\$1500 premium if longer than 5 days

Ready-Made Call Campaigns

Outbound call campaigns based on pre-defined topics, audiences and scripts.

Quote provided

Quote provided

Product / Service

One-time fee

Ongoing fees

Contact Unlimited

Provides outbound calls to clients/prospects according to a predefined number of campaigns in an given month.

\$1500*

Quote provided

CU*BASE Conversion Support - Inbound

Post-conversion inbound member support, to help work through any issues members might be having.

\$1500*

Quote provided

CU*BASE Conversion Support - Outbound

Pre-conversion outbound member contact. Client provides any call and email lists.

\$1500*

\$2.50 / call

“

Core Direct Lending has been a huge asset to our team. Xtend's increased lending role has helped speed up the application process by providing more information within applications through tool 2. We're looking forward to the future of Core Direct as Xtend continues to grow and develop its lending process.

”

Day Air
Credit Union

Xtend Contact Center handles inbound and outbound calls.

We extend service hours and volume, deliver campaign marketing messages, and represent your credit union's friendly face to your members.



Communications

Ongoing

	One-time fee	Ongoing fees
Member Reach Targeted emails to members based on a pre-defined schedule of activities. We also manage your bounces and unsubscribe requests.	\$1000	\$300 / month \$0.02 / email
Member Reach Plus An add-on to Member Reach. Leverages member interaction rates to deliver targeted marketing content.	\$200	\$75 / campaign \$0.02 / email
HTML eStatement Notifications Interactive eStatement Notification Emails, updated monthly with custom content provided by your CU or generic ads from Xtend. Driving promotions and awareness to your eMembers.	\$100	\$50 / month \$0.05 / email
eNewsletters An online newsletter in partnership with I Make News, Inc. We provide content, and you can include custom content each month.	\$300	Starting at \$250 / month

“
We strongly recommend
using Xtend's Member
Reach services.”

”

Community West
Credit Union

Xtend Communications delivers information and marketing to members, and helps credit unions reach their members in more effective ways.

Marketing Campaigns

	One-time fee	Ongoing fees
Custom Messages Customized, targeted electronic messages to members. Includes data mining and execution. Post-campaign analysis is available upon request; additional fees may apply.	\$100	\$0.02 / email
Multi-Channel Campaigns A one-time custom campaign. Includes audience, content, channels and execution. Pre-campaign analysis is available upon request; additional fees may apply.	Quote provided	\$0.02 / email \$2.50 / call Print & postage quotes provided if applicable
Quick Pick Campaigns Pre-built content and audiences for commonly requested topics branded to your CU – drives quick execution and return.	\$200	\$0.02 / email
RevGen Campaigns Bundled campaigns, starting at four per year. Pre-campaign analysis is available upon request; additional fees may apply.	\$1000 Annually \$200 / additional campaign max 2	\$0.01 / email Quote provided for additional channels
Letter Check Printed checks and promotional letters for targeted CU credit card holders, encouraging balance transfers to pay off outside debt and increase your credit card portfolios. Additional marketing channels available by request.	\$500	Print & Postage - Quote provided
CLIP - Credit Limit Increase Program Non-traditional lending focus to increase your loyal members' credit card limits – includes limit increase processing, audience creation, marketing execution, and standard reporting.	\$500	\$2.75 / increase \$0.02 / email
Graphic Design Custom print and digital designs for your marketing campaigns including logos, postcards, flyers, letter checks, t-shirts, digital banners, social posts and more.	n/a	\$75 / hour

Journeys

	One-time fee	Ongoing fees
Losing the Love Provided in partnership with Xtend Data Analytics, Member retention program focused on identifying members with decreased activity, offering insights as to why and sending them specific communications to help retain them.	\$1000	\$300 / month \$0.02 / email
New Member Onboarding A series of personalized communications to welcome new members and connect them to products/services they haven't yet enrolled in.	\$1000	\$300 / month \$0.02 / email
Member Journeys A guided series of communications designed to add value to members' lives by providing specific solutions that compliment their engagement with the CU; based on triggered events within a members' lifecycle- ie: New Loan Journey and/or Payment Reminder Journeys.	\$1000 / Journey	Quote Provided

Digital Communications

	One-time fee	Ongoing fees
OLLE- OnLine Lead Engine Our custom online contest software, designed to convert digital interactions (such as on social media) into loan leads.	n/a	\$250/ contest, OR \$2000 / year
Managed OLLE Individual online contest campaigns, managed by us and utilizing our OLLE software. Includes contest content, emails and loan lead follow-up phone calls to members.	\$500 - 600 / campaign	\$0.02 / email \$2.50 / call
Social Media Management Leverage our convenient Social Media Portal to manage multiple CU social media accounts, or have Xtend manage your social posts for you.	\$400	Self- Service - starting at \$150 / month Xtend Managed - starting at \$450 / month
Social Media Consultation Digital Marketing expert evaluate your social media platforms, provide insights into your content creation, help increase engagement, and review metrics measurements and other critical tools.	\$600 + T&E	n/a
Marketing Tune-Up Marketing experts evaluate your credit union's marketing performance, and provide recommendations on how to improve, to boost the performance of your marketing campaigns.	\$2000 + T&E	n/a
Marketing Plan Full-featured Marketing Plan designed specifically for your credit union, including an in-depth study of your product/service performance, recent member behaviors, social media data, and more. Includes a customized set of marketing tactics and a content calendar to follow.	\$4000 +T&E	n/a

Bookkeeping



Product / Service	One-time fee	Ongoing fees
Base Service Daily Share Draft, ACH, and EFT reconciliation, settlement and exception reporting.	\$350 - \$500	\$150 - \$550 / week
Stand-in Support Short-term support for holidays, vacations and staffing shortages.	\$250	\$35 / month \$50 / day for Basic \$65 / day for Custom
Services A La Carte Customized daily / weekly / monthly back office support services.	Quote Provided	Quote Provided
5300 Call Report Services Configuration of 5300 in CU*BASE and assistance with 1st quarterly upload; assistance with subsequent quarters optional.	\$995 - \$2995	\$450 - \$650 / quarter
5300 Call Report Services (stand-in) Short-term support for your 5300 Call Report needs for holidays, vacations and staffing shortages.	\$995 - \$2995	\$650 / quarter
CU*BASE Conversion Support Bookkeeping service for up to 90 days for new CU*BASE conversions.	\$4000	n/a
EFT Plastic Support Bookkeeping support with plastic-related projects, research and network issues.	Quote Provided	Quote Provided
Bookkeeping Tune-Up A specialized review of daily, monthly & quarterly bookkeeping tasks, policies and procedures, including assistance with CU*Base tools used during these processes.	\$2500	Quote Provided
Lockbox Credit card payments posted and processed through a dual control system.	\$2500	\$155 / month \$0.77 / item

Specialized Lending Support Services in partnership with Lender*VP

	One-time fee	Ongoing fees
Investor Reporting & Escrow Administration Reconciliation, escrow analysis and payment, agency reporting for Fannie Mae, Freddie Mac and FHLB portfolio loans.	Quote Provided	Quote Provided
Portfolio Conversion Project management for the conversion of portfolios from a third-party service to CU*BASE.	Quote Provided	Quote Provided
Investor Reporting (standard participation) Monthly settlement of standard-participated loan portfolios.	Quote Provided	Quote Provided

“
We’re saving money
now by using Xtend,
versus hiring another
bookkeeper.
”

Gabriels Community
Credit Union

Xtend Bookkeeping provides
back-office support for our clients.

In addition to their services,
our bookkeepers pass on their
best-practice expertise to clients,
allowing them to improve their own
processes.



Data Analytics

Reporting

One-time fee

Ongoing fees

Marketing Scorecard

A brief, two-page analysis of your credit union's hidden marketing opportunities. Focuses on membership breakdown by age, credit score and service enrollment.

\$75

\$50 / scorecard

Call Center Scorecard

An analysis of your calls and callers for the most recent month. Includes details on staff call performance, labeling, member demographics and more.

\$75

\$50 / scorecard

Enhanced Campaign Reporting

An in-depth analysis of your recent marketing efforts. Compares target audiences to membership, member participation in marketing efforts, and ROI tracking. One hour charge minimum.

n/a

\$100 / hour

Direct Deposit and Checking Account Call Reporting

A report on direct deposit and checking account call campaign effectiveness. Focuses on how recent calls are affecting participation in these services.

\$300

n/a

CD and Money Market Call Reporting

A report on CD and money market call campaign effectiveness. Focuses on how recent calls are affecting participation in these services.

\$300

n/a

Losing the Love Enhanced Reporting

Additional reporting on your Losing the Love campaign, focusing on whether contacted members are changing behavior or have closed their accounts.

n/a

\$100 / behavior

New Member Reporting

A custom report on your current New Member Onboarding (NMO) process by understanding the engagement level of your new members after their first 90 days at the credit union.

\$500

\$150 / month

Audience Builds

	One-time fee	Ongoing fees
Custom Target Audience A list of your target audience with custom inclusions and exclusions. Includes training on how to utilize this file in the future. One half-hour charge minimum.	n/a	\$75 / hour
Managed Campaign Data Delegated data management for an upcoming campaign. We'll deliver target audience files, ROI tracking files, ROI tracking points, overall membership response rate and more.	\$500	Quote Provided

“
Marketers are told all the time how Big Data is the answer to all our prayers. Well, I've rarely had anyone offer truly concrete tactics for leveraging it, at least not in my budget range. **Xtend's Losing the Love does that. The prospect of a program that analyzes member behavior and gives us a proactive opportunity to build on our potentially at-risk relationships is invaluable.** And my department is just me and an intern currently. So having Xtend run this program for us, acting as an extension of my team, is truly gratifying and empowering.”
”

KALSEE
Credit Union

Xtend Data Analytics specializes in data mining and reporting.

We run complex queries to pinpoint targets, assemble databases and analyze member behavior patterns.



Analysis

One-time fee

Custom Marketing Analysis

A customized analysis for marketing-specific insights. Highly flexible, able to be adapted to the client's individual marketing needs.

\$100 / hour

Email Performance Analysis

A deep dive into the effectiveness of the marketing emails sent to members by Xtend on behalf of your credit union.

\$500 (one month)
\$1000 (one quarter)
\$1500 (one year)

Know Why Your Members Call

An in-depth analysis of recorded interactions with members, leveraging Wrap Up Code data in CU*BASE to reveal caller patterns and provide insight.

\$500 (one month)
\$1000 (one quarter)
\$1500 (six months)

Know Who to Contact

A detailed report outlining two potential target audiences for upcoming marketing campaigns, based on an in-depth review of product/service performance, member availability and more.

\$750 / analysis

Know What to Market

A comprehensive report on two products/services recommended to market, based on a review of data-indicated growth opportunities and membership needs.

\$750 / analysis

Know Your Online Credit Card Holders

A report on online credit card holders' behaviors and determining which products/services they are likely to need. Requires online credit cards with CU*BASE.

Starting at **\$800**

Know Your Outside Credit Card Holders

A report on credit card holders' tradeline data and payment behaviors to determine which products/services they are likely to need. Requires CU*BASE software and CU*BASE Data Warehouse.

Quote provided

Consultation

One-time fee

Ongoing fees

Wrap Up Code Consultation

A demo and discussion of the Wrap Up Code technology in CU*BASE, configuration of codes, complimentary configurations and an overview of related analytics.

\$800

n/a

Sales Tracker Consultation

Two meetings discussing how Sales Trackers are configured/built, a walkthrough of current configurations, assistance in configuring desired Memo Types, Need Groups, and Task Numbers. Includes methods of tracking Sales Trackers and various strategic options.

\$800

n/a

Sales Tools Crash Course

A two-hour meeting to walk through CU*BASE dashboards, Member Connect, Common Bonds, and a short discussion of what's possible through the Data Warehouse.

\$500

n/a

Frequent Caller NSP Program

Harness the power of your wrap up code data to work inbound leads for your frequent callers on a monthly basis. Includes tracker configurations, a CU*BASE file, and a monthly service of completing your unworked NSP trackers.

\$300

\$150 / month
\$1.00 / NSP

Partner Services

Product / Service	One-time fee	Ongoing fees
Xtend Shared Branching Marketing and oversight of the CU*BASE Shared Branching Network Consortium, which allows your members to perform transactions at participating branches across the US.	\$500	\$450 / year
Cooperative Liquidity Exchange A digital marketplace of investment opportunities with credit unions and CUSO partners, including CDs, loan participations and more.	\$200 / post	n/a
Mobile Coupon App By Relevant Solutions. Mobile shopping coupons for members. Can be embedded in a credit union's mobile app or used via a standalone app. Local merchant coupons can be added.	Starting at \$100	Quote provided
Digital Signage By Revel TV. Digital signage installation, content creation and delivery via Channel Valet, Revel TV's cloud-based software.	Quote provided	Quote provided for hardware installation; Starts at \$150 / month for Channel Valet
Two-Way Text Messaging Text-enable your existing landlines for member contact. Includes PC, browser and app management for your team.	Quote provided	\$125 / month for up to two lines \$100 / month for each additional line

When we work
together, **we win.**

Xtend Partner Support services are offerings we provide in collaboration with our partners. These involve innovative technology and unique opportunities for growth and member service.

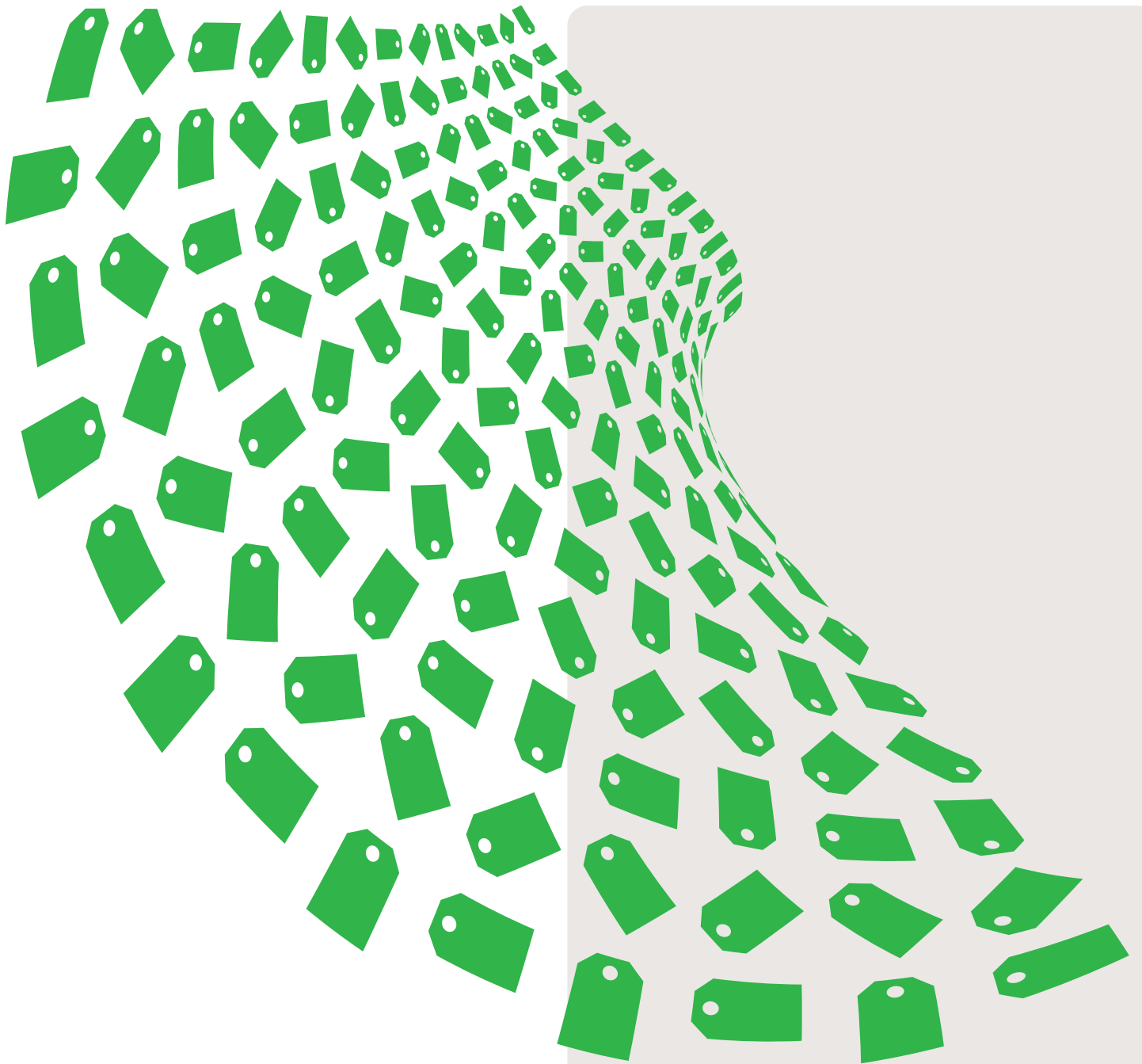
Professional Services

Product / Service	One-time fee	Ongoing fees
Board Planning Session Facilitation We'll help facilitate annual board planning sessions and other strategic events.	T&E	n/a
CU* Base Marketing & Sales Consultation On-site consultation by our management team, focusing on CU*BASE cross sales, tiered services, contact center execution, business development and electronic communication strategies.	Starting at \$1000 / day + T&E	n/a
Bookkeeping Consultation On-site consultation by Xtend Bookkeeping management team leaders. Focusing on CU*BASE optimization, loan servicing and back-office productivity.	\$1000 / day + T&E	n/a

You're building a
solid foundation
for the future.
We can help.

Xtend Professional Services are our way of passing on what we know. Every consultation is an opportunity to help instill best practices, improve efficiency and set up future successes.





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