

# Xtend & B2B Marketing

eXecution Through Empowerment Network and Dedication

Shabana and Vivian  
Media Coordinator and Creative Lead



# Agenda

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**Business to Business**

**CUSO Challenge**

**Xtend Marketing**

**Xtend Social Media**

**Graphic Design**

**Reporting**

# B2B Business to Business Marketing

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## B2B Marketing:

- B2B clients can leverage our marketing teams for strategic marketing plans & execution. These services provide clients with customizable marketing products that grow clients' business goals.
- Social Media, Email Marketing, Marketing Consultations, Monthly Reports

## How Xtend approaches B2B Process:

- Research, SWOT Analysis, Marketing Consultations, Marketing Plan, Reporting

## Execution:

- Content Creation on calendar schedule
- Bimonthly Meetings – get feedback from client
- Concentrate on Social Media with some Email Marketing with eDOC
- Reporting – provide stats on effectiveness

## Successful B2B client relationship:

- Clear communication, Manage expectations, Collaborate & discuss, Innovated thinking and problems solving
- Continuous Development & expanding of services



# CUSO Challenge

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**CUSO Challenge is a series of initiatives aiming to build awareness for the role of CUSO's in growing Credit Unions.**

- Advance the self-sufficiency, growth, & market position of all credit union
- Engaging CUSO'S in growing Credit Unions
- It is essentially a way for credit unions to outsource responsibilities onto CUSO's and access a pool of collaborative resources

## **Five initiatives**

- Denovo Credit Unions, Deposit Insurance, Scholarship Fund, Think Tank, NCUA Governance
- Xtend is marketing series of webinars
- We continue to build awareness for what CUSO can offer



# How Xtend Markets

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## Events

- Roundtables
- Webinars
- Annual Conferences

## Digital Marketing Channels

- Email Marketing – Campaigns for services, promos, and business updates
- Social Media have more slides later
- Press Releases
- Surveys

## Marketing & Sales

- Service Description Documents

**XTEND WEBINAR**  
**DATA ANALYTICS**

Empower Your Credit Union with Xtend Data Analytics

Hosted by Sarah A. Business Intelligence Manager

TUESDAY OCTOBER 11 TIME 1:00 PM EST

**Answer quick questions with Scorecards.**

**What is it?**

Scorecards provide short, simplified analysis you can obtain on a recurring basis and use to report on key business indicators. They can report past, present, and future performance against goals, and provide you with a deeper understanding of different areas of your membership.

**Available Scorecards**

- **Call Center Scorecard** - A tool to help you track and analyze performance with a call center supervisor or analyst. Your call center supervisor or analyst can use this scorecard to track and analyze performance with their members.
- **Marketing Scorecard** - A tool to help you track and analyze performance with your marketing campaigns. It includes information on member acquisition, retention, and engagement.
- **Lending Scorecard** - A tool to help you track and analyze performance with your lending activities. It includes information on loan originations, delinquency, and charge-offs.

**Need further information?**

I look forward to providing further information & answering any questions you may have during a scheduled meeting this week, and early next week!

**The Split of Xtend Call Center**

**What split?**

Over the past year, contact center management has been streamlined. The split will be splitting into East & West teams starting on 10/1/2023. The split will be implemented on 10/1/2023. The split will be implemented on 10/1/2023. The split will be implemented on 10/1/2023.

**Why are we splitting?**

- Improve member service
- Reduce costs
- Increase efficiency

**What does this mean for you?**

- You will have faster service with the split.
- You will have more control over your team.
- You will have more control over your team.

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**Xtend Communications RevGen Pricing & Features**

Generate more revenue with four funded marketing campaigns per year, with ROI reporting included. Send targeted HTML emails, phone calls, online banking alerts, and more.

Marketing Package	Pricing
• 10 Targeted Email Campaigns	• \$1000 per month
• 10 Targeted Phone Calls	• \$1000 per month
• 10 Targeted Online Banking Alerts	• \$1000 per month
• 10 Targeted HTML Emails	• \$1000 per month

**Campaign Add-Ons**

- Additional Campaigns
- Additional Phone Calls
- Additional Online Banking Alerts
- Additional HTML Emails

# Social Media for Xtend

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## Goals

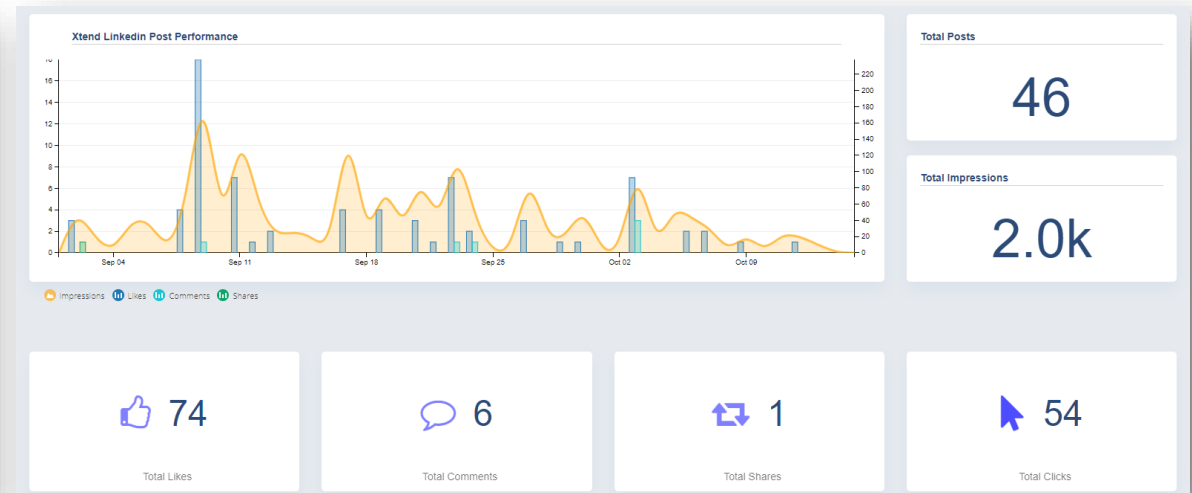
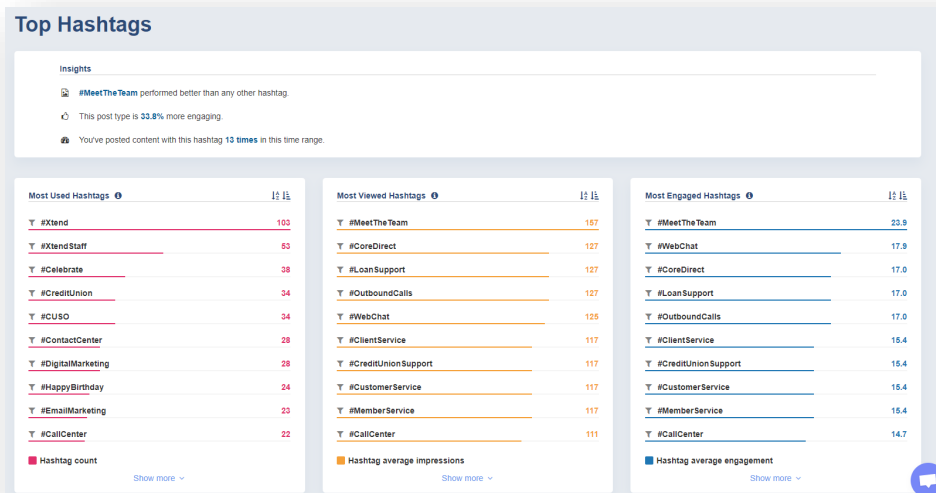
- Engagement
- Retention
- Growth

## Tactics

- Consistency
- Education
- Innovation

## Platforms

- LinkedIn
- Facebook
- Little Bit of Twitter



# Social Media for Xtend

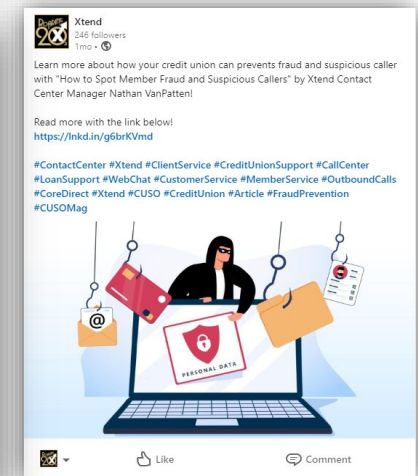
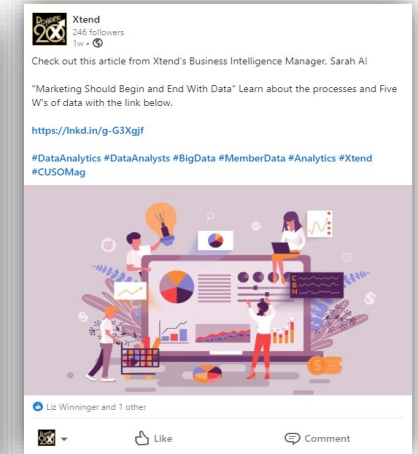
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## Xtend Business

- Marketing of offerings and partners
- Service and Software Updates
- Events
- Client Testimonials
- Educational Articles & Financial Literacy
- Xtend Values- Execution, Empowerment, Network, Dedication, Inclusiveness

## Employee Showcasing

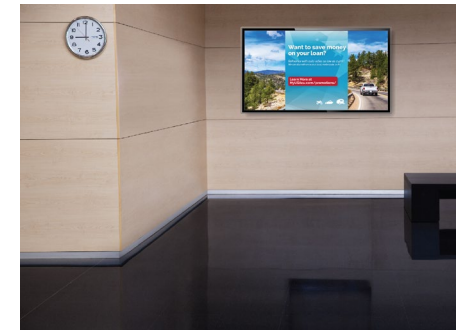
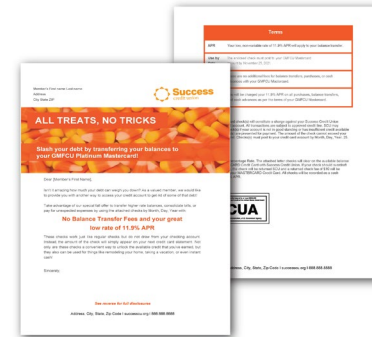
- Birthdays
- Work Anniversaries
- Work Promotions
- We are Hiring
- Spirit Weeks
- Meet the Team
- Articles and Press Releases from Employees



# Add some Graphic Design

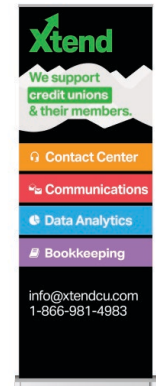
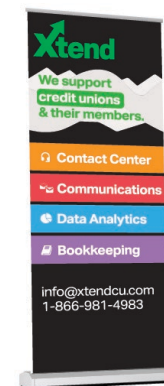
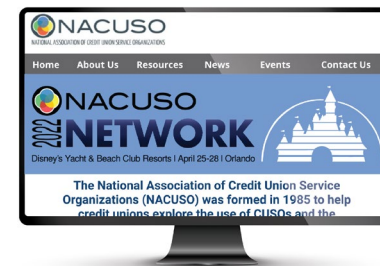
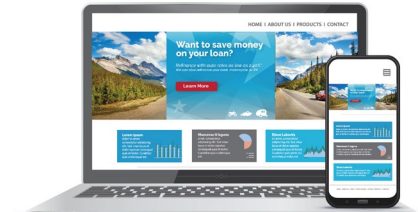
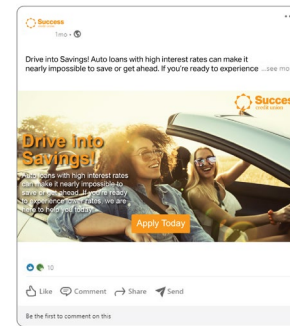
## Add Custom Graphics to your next Campaign

- Digital Banners – Website, Mobile
- TV Branch Graphics
- Print Documents – Letters, Postcards, Brochures
- Social Media Graphics



## Get the word out for your next Conference or Event

- Trade Show Banners
- Signs
- Digital Banners
- Print Documents
- Social Media





# Reporting for Xtend

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## Report On

- Website, Emails, Forms

## How We Track Data

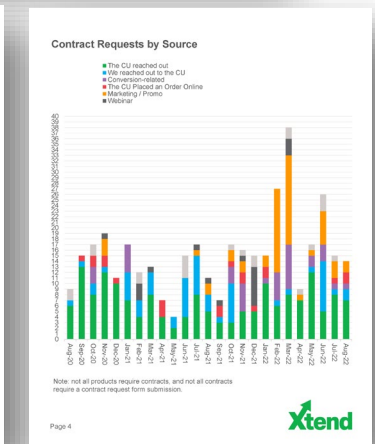
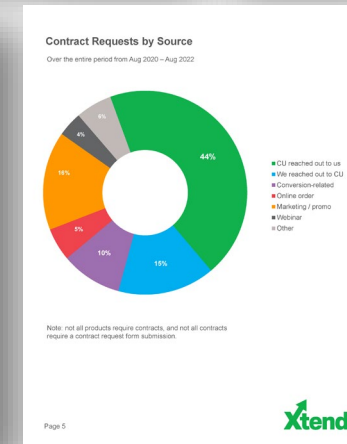
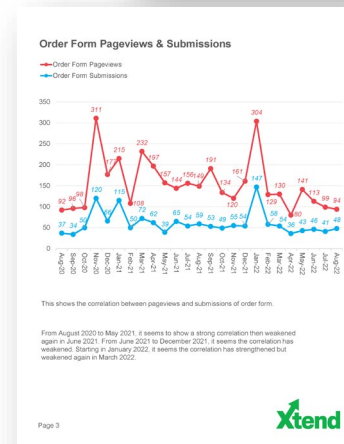
- Google Analytics, Website submissions, Marketing Cloud

## Marketing Effectiveness Report

- Analyzing data and showing connections with graphs
- Track insights, create an action plan and apply it to future marketing

## Web & Email Report

- Track things like Pageviews, Website Traffic Sources, Averages for Open Rates, Clickthrough Rates
- Focus Department Campaigns for that month how many emails did we send, Impressions and Clicks generated



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**Questions? Or Comments?**



**Thank you!**

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