

Xtend Communications

The Marketing Arm of Our CUSO

We strive on delivering the right message to the right member at the right time, all while maintaining relevancy in member's lives.



Ongoing Outreach Services by Name

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Member Reach: All-encompassing, automatic communication package including: - Library of 40 Message automations - Unsubscribe/Opt-Out Management

Journeys: Automated data driven series of communications. Triggered by events in the member lifecycle with a lot customization options for data and content.

New Member Onboarding: a prebuilt journey for communicating with members in the most important time in the relationship; the first 90 days.

HTML eStatement Notices: You get one every month. “Your statement is ready...” Reinforce your brand and your most current initiatives. HTML formatted eStatement notifications.

And much more!

Member Reach

Member Reach is Xtend's all-encompassing, automatic communications package including:

- Library of 40+ Automations and Messages
- Unsubscribe/Opt-Out Management
- You choose which message you would like sent to your members
- Each email is based on a pre-defined activity or event (member pays off a loan, opens a new CD, etc.)
- Email copy and templating can be customized to allow for your brand's consistency

Member Reach Message Library					
CU Library	Message Topic	Code	Message Subject Line	Day Sent	Target Audience
Daily Message					
Daily Message Sends					
	New Membership	BS	Welcome to Your Credit Union	Every Day	Standard+Open Dt Membership & Open Dt 000 Acct is One DAY Prior to Send Dt
	Birthday	BT	Wishing you the Best Birthday Ever!	Every Day	Standard+Bday equal to Send Dt
Weekly Messages					
Weekly - See Day Sent Column				Weekly	
	Paid Off Loans	AA	We are Celebrating Your Success	Monday	Standard+Close Dt (closed-end loan) One Wk Prior to Send Dt
	Turned 18 - No Checking	BM	Celebrate with a New Checking Account	Monday	Standard+18th birthday one week prior, no draft account on file
	Certificates Reaching Maturity	AB	Your Membership Matters	Tuesday	Standard+Maturity Dt 1-11 days After Send Dt
	Closed Membership	AC	We Are Sorry You Have Left Us	Tuesday	Standard+Close Dt (mbrship) One Wk Prior to Send Dt
	Approved but not funded loans	BN	We Appreciate You	Tuesday	Standard+Loan application date one week prior, status not equal to deleted, no open date on file
	New Membership	AD	Welcome to Your Credit Union	Wednesday	Standard+Open Dt Membership & Open Dt

Customizations:

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Build your Member Reach library to fit your credit union!

Available Customizations:

- Images
- Headers
- Footers
- Verbiage
- Logo Placement
- Links
- Social Media
- Colors



It's nice to meet you!

Welcome to your new membership at Cumberland County Federal Credit Union!

At Cumberland County Federal Credit Union, you're not just a member, you're an owner! We hope to exceed your expectations of service and convenience.

Please let us know if there's anything we can do to make your experience great!

[Visit Our Site](#)

Member Reach Message Library

Please choose "Yes" or "Opted Out" in Column C for the messages you wish to include in your NEW custom message library, then provide Loan Cat. Or Div. Apps as needed.

CU Library	Message Topic	Code	Message Subject Line	Day Sent	Target Audience	Loan Category	Dividend	Underwriting
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Daily Message

Daily Message Sends



Items that **cannot** be changed:

1. When the messages are sent out
2. Who the target audience is
3. Message Topic
4. Opt-Out verbiage/footer
5. Return email address

HTML Email Examples

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To view this email as a web page, go [here](#).



Take your new membership wherever you go!

With a Success Credit Union checking account, it's easy to take the benefits of your membership everywhere you go.

We offer debit cards, nationwide ATM access, overdraft protection options and more.


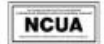
Want more info on our checking accounts? Give us a call, stop by, or click the button below!

[Learn More about Checking Accounts](#)



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We will never contact you to obtain account information. As part of our effort to be greener, our primary communication is through email. If you choose to opt out of future emails, you may miss important information and announcements.



To view this email as a web page, go [here](#).



We miss you.

It's been a few months since we've seen you, and your credit union account will soon become dormant.

A special warning will soon be placed on the account, a dormancy fee will be charged each month, and all activity will be monitored. Refer to the Fee Schedule for additional information.

Want to keep your account active?



Just do one of the following:

- Come into a branch and conduct a transaction
- Get in contact via phone or email
- Make a deposit at an ATM
- Use our mobile app to pay a bill
- Use our mobile app to deposit a check or transfer funds



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Mobile Banking keeps you connected.

With mobile banking, your accounts are always at your fingertips.

Many of the functions of It'sMe247 are now on phones, tablets and other devices! Watch your money grow or apply for a loan anytime, anywhere.

Let's set up Mobile Banking!

It's quick! Here's how to get started:



- Log into It'sMe247
- Click "Go Mobile"
- Select Mobile Banking or Text Banking

[Log into It'sMe247](#)

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Journeys and NMO

Automated data driven series of personalized communications.

Examples of available Journeys include:

- **New Member Onboarding:** Help new members understand your products and services and remind them to enroll in self-services like Online Banking, eStatements, Bill Pay and more.
- **Plastics:** Notify members when a new card is ordered and include helpful information like destination address and printed name.
- **Past-due Reminders:** Offer reminders to members if they are past due on a payment.
- **Custom Journeys:** Cover topics that fit you and your member's needs.



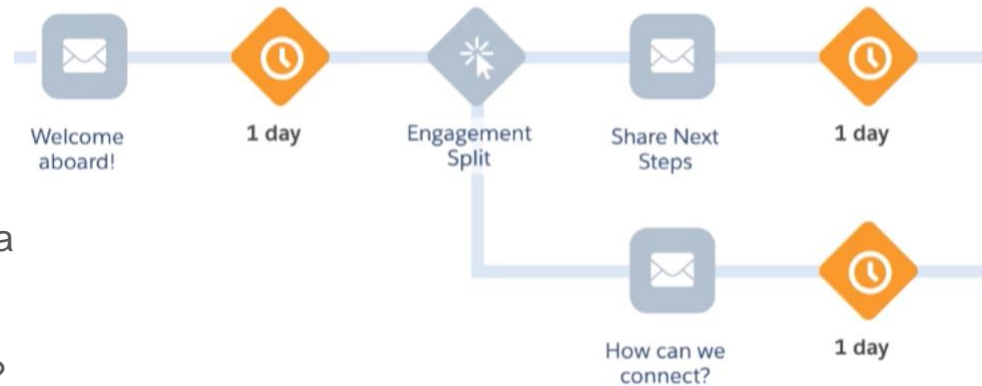
How do Journeys Work?

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Leveraging **live data & dynamic content** to provide unique, personal member experiences while working toward Credit Union goals of increased engagement and awareness.

Create your Map

- Work with our team to build custom journeys for your members
- Who do you want to be targeting? What event causes a member to enter the journey?
- What are the key details to know about your audience?
- How many messages do you want to send?
- How often do you want to update the data/how often should people be entering the journey? Daily? Weekly? Monthly?





Personalize the Content

- These emails are personalized with a master data set built and managed by Xtend.
- Message content varies depending on recipients' data points at day of send
- Emails are sent out on an automated schedule, 30 to 60 days.

Dynamic Content

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Has not signed into online banking



Take control of your finances.



Online banking is the most convenient way to check your accounts, transfer funds, pay bills and more.

Here's how to log in:

1. Click the "Log in to Online Banking" button below
2. Select the "First Time User?" option
3. Enter your *account number* and *social security number*
 - If you forgot your account number we can help. Give us a call at 000-000-0000
4. Click the "Continue" button
5. When prompted as necessary
6. Enjoy the ease of banking online anywhere you go!

[Log in to Online Banking](#)

Has signed into online banking




Manage your money on the go!


Living life on the go? Make things a little easier by downloading our mobile app and start banking from anywhere!

Here are just a few of the highlights:

- Check your accounts
- Transfer funds
- Apply for a loan
- **[ANY OTHER FEATURES?]**

Click the link below and head on over to your phones app store to download the app today!

 GET IT ON Google Play

 Available on the App Store

New Member Onboarding

- Streamlined communications within a new members first 60-90 days focused on building stronger relationships while educating members on credit union products & services.
- Send schedule based on milestones defined by and built to meet desired outcomes of the journey

Sample New Member Onboarding Schedule:

Touchpoint:	Message:	Email Subject Line:	Rule/Audience:	Default Send Date:
Touchpoint #1 (Welcome)	Direct Welcome:	<i>(Name), thank you for choosing us!</i>	Sent to direct members	Day 1: 24 hours after membership open
	Indirect Welcome:	<i>(Name), It's a pleasure to meet you!</i>	Sent to members with indirect loans	
Touchpoint #2 (Online Banking)	Online Banking:	<i>(Name), what can you do with online banking?</i>	Sent to members who do not have online or mobile banking	Day 4: 3 days after Touchpoint #1
	Mobile Banking:	<i>Are you always busy?</i>	Sent to members who have online banking, but not mobile banking	
	Self Services:	<i>Your money, your way.</i>	Sent to members with both online and mobile banking	

HTML eStatement Notices

You likely get one every month. “Your statement is ready...”

Upgrade to HTML formatting to:

- Reinforce your brand
- Drive your most current initiatives
- Ensure eStatement users receive the same promotions or important notices as your printed statements



Thank you!



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