



Fall 2025 Roundtable Highlights

A curated summary of insights, tips, and trends shared by credit union marketers during our most recent Communications Roundtable.

Marketing Channels: What's Working & What's Changing?

Across the group, the theme was clear: make data-driven decisions. Most teams rely heavily on performance insights to determine where to focus their efforts.

Social Media Highlights

- Instagram & Facebook were the most universally used platforms.
- Many marketers shared that content creation is time-consuming, and keeping up with social expectations can be overwhelming.
- LinkedIn is primarily used for hiring and career-related updates.
- TikTok drew curiosity, but concerns around platform stability, regulatory uncertainty, and compliance held most CUs back.
- A helpful shortcut mentioned: resharing content from reputable financial educators to supplement your feed with high-quality information.

Engagement Notes

- Short-form videos and reels consistently see the highest engagement.
 - Facebook tends to get more member comments, while Instagram drives more passive engagement.
 - The YouTube algorithm behaves very differently from Facebook and Instagram and requires a separate approach.
 - Some marketers dislike that LinkedIn requires linking to personal profiles.
 - Most agreed that chasing algorithms isn't worth the effort in today's landscape.
 - Several noted the decreasing impact of hashtags on visibility.
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Branding & CU Swag

Every credit union uses swag that reflects their brand identity and values rather than generic promotional items.

Common swag ideas included:

- Branded insulated cups
- Personalized employee recognition sets
- Recycled or eco-friendly items
- Cozy comfort items (mugs, cozies, seasonal gifts)

Brand Spotlight

One CU shared how they live out their values of adaptability and sustainability by:

- Offering eco-conscious giveaways
 - Planting a tree for every new account
 - Navigating a brand merge where two identities must remain distinct (e.g., using land/tree symbolism for one brand and water/lakes for the other)
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Content Creation

Many participants discussed ways to streamline content creation, including the benefits of working with external agencies for videography, web content, and professional-level creative assets.

Tips to Boost Engagement

- Leverage popular music, trends, and video formats
- Prioritize short-form reels for reach and engagement
- Highlight community involvement and recognizable locations
- Track what's effective using simple monthly metrics

Most Common Reporting Metrics

- Top three performing posts
 - Impression counts
 - Total followers across each platform
 - Several CUs recommended relying on Meta's built-in reporting tools
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Fraud Notifications & Member Education

Fraud communication was a major topic, with most agreeing that automated emails remain one of the most effective channels for reaching members quickly.

Challenges & Lessons Learned

- One CU experienced increased complications when switching to multi-factor authentication, prompting additional member outreach.
- **Sharing posts about spoofed phone numbers or current fraud tactics significantly reduced fraud attempts — highlighting the power of education.**
- Most CUs avoid text messaging for fraud alerts because it feels impersonal, “salesy,” and is frequently blocked.

Fraud Prevention Best Practices

- **Create a fraud landing page for quick updates, FAQs, and action steps.**
- **Share proactive, educational posts about trending fraud types.**
- Bring education into the community through presentations at:
 - Schools
 - Senior centers or nursing homes
- Greenlight was recommended as a tool for teaching minors safe financial habits.

Many also acknowledged that print is underutilized, even though members often respond well to occasional postcards.

Trending Topic: Mortgage Campaign Success

Participants shared successful strategies currently gaining traction:

- Offering no closing cost mortgage promotions
- Focusing on small mortgages, with larger loans handled through partners
- Highlighting home equity loans and HELOCs as competitive alternatives