

PROMO FORWARD: THE MEMBER ENGAGEMENT ENGINE

A turnkey solution to boost member engagement, drive product awareness, and grow results — all year long.

YOUR ALL-IN-ONE MARKETING ENGINE – BUILT FOR CREDIT UNIONS

Promo Forward is a strategic marketing solution that helps credit unions like yours stay consistently visible, relevant, and results-driven. From planning to execution to analytics, we handle it all – with your team's input and your members in mind.

KEY BENEFITS



**FULLY MANAGED CAMPAIGN
CALENDER**



TRANSPARENT RESULTS REPORTING



**CROSS-CHANNEL MEMBER
ENGAGEMENT**



**BUILT FOR COLLABORATION
WITH YOUR TEAM**



**CUSTOM, ON-BRAND VISUALS
& MESSAGING**



**TURNKEY VISUALS AND
MESSAGING, READY
TO LAUNCH**

MONTHLY DELIVERABLES AT A GLANCE



CAMPAIGN STRATEGY + PLANNING

- Coordination of Annual calendar of seasonal promotional offers and product pushes (e.g., auto loans, HELOCs, CDs)
Campaign theme + messaging development
- Theme and promotion development (e.g., "Loan Local," "Spring Into Savings")



DIGITAL MARKETING

- Social media post graphics (3 per promotion)
- 1 branded short-form video per promotion (sized for Facebook or Insta)
- 1 targeted e-newsletter - design + send
- Website homepage banner or promotional graphic (monthly refresh)
- Branch digital screen graphics
- Online banking digital graphics
- App digital graphics
- Marketing automation: Choose Email or SMS
- Promotion landing page design



IN-BRANCH MARKETING SUPPORT

- Staff promo clothing or buttons
- Branded branch display to fit 8' table or space dimensions of client choice
- Lobby signage: flyers, buck slips, 5 x 7 counter cards



POST CAMPAIGN ANALYTICS

- Monthly meeting to review campaign results with CEO & lending team
- Monthly branded report: what was promoted, where and performance metrics
- Optional: slide deck summary for board or leadership presentations
- Member engagement snapshot: email metrics, social reach, web traffic to promo pages



PROMOTIONAL MEDIA BUY SUPPORT

- Local media buys: radio or newspaper
- Digital media buys: paid social media, Youtube, Spotify

INVEST IN CONSISTENT ENGAGEMENT

PLAN	MONTHLY	ANNUAL
Promo Forward package	\$3,500	\$42,000

Includes 12 turnkey campaigns, strategy support, digital assets, and full reporting.



Strategy
Included



Targeted
Campaigns



Monthly
Reports



Digital +
In-Branch Reach

OCUL EXCLUSIVE!

FREE WEBSITE REDESIGN OR 12 MONTHS OF FREE HOSTING
WITH ANNUAL PACKAGE PURCHASE.



MARKETING
+ BRANDING

LET'S BUILD SOMETHING POWERFUL TOGETHER.

READY TO LAUNCH YOUR FIRST CAMPAIGN? SCAN THE QR CODE TO GET STARTED.



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