

DIGITAL TRANSFORMATION FOR CREDIT UNIONS:

Grow Membership and Increase Wallet Share with Marketo EngageTM

Marketing organizations at credit unions face unique challenges as they compete to attract and retain members in an increasingly competitive marketplace.

Not only do they need to drive revenue with targeted personalized offers across channels, they also need to expand member wallet share to remain profitable.

To achieve these goals, strategic, data-driven marketing outreach is essential. But, handling everything internally—from system implementations and data management to lead scoring and nurtures to developing and executing effective campaigns—can overwhelm lean internal marketing teams, especially those without a solid demand generation strategy, technology stack, or data management practices.

Combining the power of Marketo Engage with DemandGen's expertise and technical marketing know-how has helped many credit unions successfully undergo digital transformation.



Credit unions who partner with DemandGen improve member retention, quickly drive new member acquisition, and increase marketing's impact by



PLATINUM MARKETO ENGAGE
Solution Partner



Accredited
Partner Solution

LET DEMANDGEN LEAD THE WAY

DemandGen's Digital Transformation Solution comprises essential technical and consulting services designed to enable credit unions to maximize the value of Marketo Engage, including:



Implementation

As your award-winning Marketo-Certified Platinum Partner, our experts will provide you with both the strategic guidance and hands-on expertise your team needs to leverage the full power of Marketo Engage and get maximum value from your investment.



CRM Integration

Whether you're implementing a CRM with marketing automation for the first time, replacing an existing system, or enhancing your CRM/MA integration, our system-certified CRM and marketing automation consultants will customize your CRM/MA solution to your specific business needs and requirements.



Customized Training

Our Marketo training services get your team comfortable and adopting Marketo quickly. The training is customized to meet your organization's needs and encourages alignment around critical marketing automation processes and methodologies.



Marketo Admin Services

Our team of award-winning certified experts will administer, monitor, and optimize your use and adoption of Marketo for you, providing knowledgeable resources and proactive platform management with your own dedicated Marketo Administrator.



Data Audit

As a first step to an effective data management strategy, we will provide insight into the state of your data and make recommendations for addressing key issues with a data audit, a critical asset in measuring the impact of your data hygiene initiatives.



Data Normalization

Our data normalization service runs continually in the background to ensure all of your data is clean, complete, and meaningful to your business, so every action taken against it is worthwhile.



Lead Management Framework

We will work with key stakeholders from sales and marketing to define your demand funnel and develop a taxonomy that encourages alignment across various stages of your buyer's journey. Next, our consultants will help you develop a content strategy and architect an efficient lead management framework in Marketo and your CRM, including funnel analytics and closed-loop reporting, to improve conversion rates and fine-tune your overall demand strategy.



Lead Scoring

DemandGen demystifies lead scoring by establishing an effective, repeatable process that identifies the funnel stage at which a lead should be passed to sales, and associates funnel stages with nurture campaigns. Our experienced system architects and CRM developers will build your lead scoring model, train your sales and marketing teams, and provide ongoing maintenance and optimizations, as needed.



Lead Nurture Framework

Our consultants work with you to develop a framework for nurturing prospects through your buyer's journey—clearly identifying lead lifecycles unique to your business and establishing the strategic parameters for your lead nurturing program—including designing and executing your lead nurture campaigns.



Campaign Execution Services

Let DemandGen act as a flexible extension of your internal marketing team and take care of all your campaign creation and execution needs. Our industry-leading certified experts can produce, manage, deploy, and monitor your email marketing campaigns for maximum impact, so you can focus on more strategic tasks.

DEMANDGEN'S DIGITAL TRANSFORMATION SOLUTION IN ACTION



DemandGen has helped leading credit unions drive growth by transforming how they engage with their audiences throughout the member lifecycle—from acquiring and onboarding new members to retaining and expanding relationships with current members.

ClearView Federal Credit Union

In 2019, ClearView reached out to DemandGen to help them move further along on their digital transformation journey, beginning with a Marketo Engage implementation. The company had been using mostly homegrown technology that was limiting their ability to provide an engaging digital experience. Marketo would enable them to use proprietary data to fuel predictive propensity models and trigger relevant offers and communications based on customers' behaviors. Additionally, they could use Marketo forms to market various banking products and create new revenue streams from their ecommerce business.

DemandGen executed its digital transformation roadmap in three phases:

- 1 **Phase one** included the Marketo implementation and data discovery process.
- 2 **Phase two** involved implementing a lead nurture framework and scoring model to help ClearView nurture and qualify leads effectively.
- 3 **Launched a new corporate website**, trained the ClearView team on Marketo, and integrated the new Marketo instance with their Advanced Reporting for Credit Unions (ARCU) system.
- 4 **Phase three** encompasses ongoing optimizations of their lead scoring model and nurture programs.

Today, ClearView's marketing team can hand over highly qualified leads to sales, and segmentation is in place to help them tailor content and personalize communications.

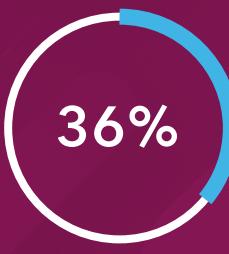
"DemandGen has been instrumental in helping us forge ahead on our path to digital transformation. Our journey has just begun, and we're already seeing results. We're confident that with DemandGen guiding the way, we'll continue to progress and achieve all of our digital marketing goals."

—Bill Snider, VP of Digital Strategy and Marketing at ClearView



18%

improvement in cross-sell ratios after 18 months



36%

reduction in single-account households over three months



20%

increase in conversions from upsell segmentations and always-on campaigns



25%

decrease in time-to-value from onboarding program development

Rivermark Community Credit Union

When Rivermark began working with DemandGen in 2017, it was looking to add members, achieve higher cross-sell ratios, and bolster the credit union's value to its members. Members used an average of **2.63 services**, but David Noble, SVP of Marketing, knew that implementing Marketo could help boost those numbers.



DemandGen led a swift implementation, integrating data elements between Marketo and Rivermark's proprietary systems to inform onboarding and re-boarding nurture campaigns. Then, they designed and implemented product interest-based, multichannel, triggered campaigns, supported by lead scoring and Rivermark's existing propensity insights. We also leveraged a third-party integration for tactile marketing via Printing For Less (PFL) to add a direct mail element to the campaigns.



The results?

Average services per customer increased another

8.5% to 2.86

"Supporting member engagement across multiple delivery channels is at the center of Rivermark's digital strategy. By connecting data with modern technology, automation tools, and relevant content, Rivermark is in position to continue growing while improving member loyalty."

—David Noble, SVP Marketing at Rivermark

LEARN MORE

Ready to digitally transform and leverage Marketo Engage to drive more conversions and revenue? Let DemandGen show you how. **Contact us today** for a free consultation to discuss your digital transformation goals. Visit demandgen.com to learn more.



For more information, visit demandgen.com/marketo-consulting/.
demandgen.com | 925.678.2511 | info@demandgen.com