



Clearview Federal Credit Union Modernizes Marketing and Lead Management with DemandGen



Today's consumers expect seamless experiences across every interaction with a brand—and that includes interactions with their financial institutions. Whether they're depositing a check, shopping for mortgages, or opening an account, they want their bank to make sure the transaction is friction free.

That's why banks and credit unions across the country are implementing digital transformation initiatives to ensure a frictionless customer experience across every customer touchpoint—from the ATM to the branch to online banking to the customer call center.

But successful digital transformation has many steps and often requires third-party expertise. That's what Clearview Federal Credit Union's marketing team discovered when they set out to implement Marketo in an effort to level up their marketing outreach. News travels fast in the banking industry, so when the VP of Member Experience and Marketing at Clearview, Lisa Florian, learned of the success Rivermark Community Credit Union was having with its own Marketo deployment, she called them to learn how they did it. DemandGen, they told her, was their secret weapon.



The Challenge: Today's Customers Demand Seamless Digital Experiences

As a company, Clearview was falling behind in the digital transformation race and its ability to meet the changing needs of customers in the Southwest Pennsylvania communities it serves. One of the challenges was that the marketing team didn't have the tools in place to generate and nurture business effectively.

"We'd been working to evolve digitally, but also knew we had a long way to go," Bill Snider, AVP of Marketing and Digital Experience said. "Our existing technology and vendors were doing the job, but we knew that we could do better. We knew that we had to improve our marketing technology stack and bring in an expert that could help us maximize this new technology so that we could deliver the engaging, top-notch experience we wanted."

Additionally, the marketing team's approach had been reactive rather than proactive, and they had few KPIs or data to drive marketing activities. They wanted to be able to use proprietary data to fuel predictive propensity models and trigger relevant offers and communications based on customers' behaviors. They also wanted to use Marketo forms to help market various banking solutions and create new revenue streams for the business via ecommerce. After the strong recommendation from the marketing team at Rivermark, Clearview reached out to DemandGen.

"If someone was sent an email and then came into a branch, we wouldn't know it, and we couldn't follow up that visit with effective communication," Snider said. "For example, we couldn't send a text thanking them for their business, or a follow-up email with information about a new product or service. We needed help building a path to success and putting the systems, processes, and strategy in place to support our digital roadmap."

Clearview's 3-Phased Approach to Digital Marketing Transformation

In early 2019, DemandGen set out to build and execute a roadmap for Clearview's marketing team and get them moving along their digital transformation journey. **The roadmap was executed in three phases:**



Phase one included the Marketo implementation and data discovery process. DemandGen also provided lead nurture framework consulting to help Clearview develop an effective lead nurture strategy.



During **phase two**, DemandGen implemented the new lead nurture framework as well as a lead scoring model to help Clearview qualify leads effectively. Clearview's marketing team worked to integrate the new Marketo instance with their ARCU (Advanced Reporting for Credit Unions™) system, where all of their member data lives. At the end of this phase, the new lead nurture framework went live.



During **phase three**, DemandGen continues to help Clearview optimize their lead scoring models and nurture programs.

One Year Closer to Digital Transformation

Today, Clearview's marketing team can hand over highly qualified leads to sales. Segmentation helps them determine what types of content and messaging to develop, which leads sales should receive, and ensures all communications are timely and relevant to the recipient.

In 2020, DemandGen continues to provide ongoing consulting to help Clearview refine its lead scoring and management framework. Additional services include implementing a newsletter subscription option to generate leads, as well as optimizing conversion tactics, such as landing pages.

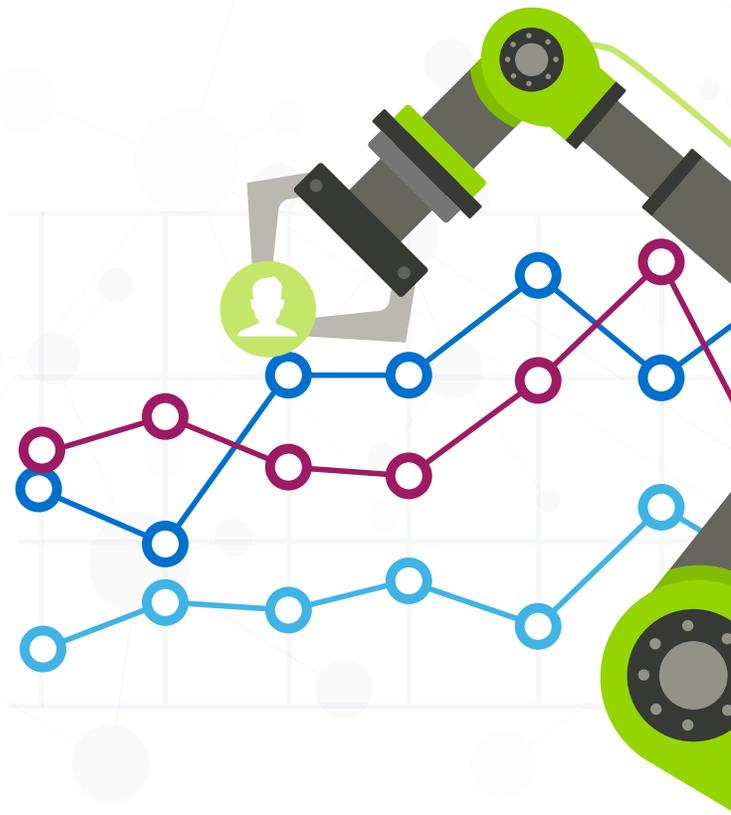
"We had never passed leads to our sales teams before," **Stephanie Yackovich**, Digital Communications Manager at Clearview, said.

"DemandGen was instrumental in stepping us through the thought process and data behind the model as well as the build in Marketo, including the associated nurtures. When I have a Marketo question, I know I have my DemandGen team there with answers."

DemandGen is also planning to integrate PFL (tactile marketing) and real-time data-driven personalization into Clearview's lead nurture campaigns, as well as assist with developing a social advertising and retargeting strategy.

Finally, DemandGen will help Clearview implement campaign attribution and detailed reporting, so that Snider's team can prove its value to stakeholders and across the organization.

"DemandGen has been instrumental in helping us forge ahead on our path to digital transformation," said Snider. "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."



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ABOUT DEMANDGEN

DemandGen Inc. is a full-stack marketing technology agency that delivers the strategic guidance and hands-on expertise companies need to drive maximum value from their investments. Privately held and based in San Ramon, CA, for more than 12 years, the company helps growth-minded organizations craft their digital marketing strategy, operationalize it in the tools, and execute it at scale.

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