

CU*PERKS

REWARDS PROGRAM

***Your Credit Union's
Competitive Edge!**



* Contents

Overview	1
Marketing	2
It's All Here	3
Service Options	4
Next Steps	5

CU*PERKS

REWARDS PROGRAM

Differentiate your Credit Union from the rest with CU * PERKS Rewards Program. Take advantage of this comprehensive, easy to use program that is sure to add great value to your credit union's product offerings and brand.

CU * PERKS can help you...

- *Acquire new members
- *Drive self-service usage
- *Boost interchange income
- *Increase brand recognition
- *Decrease member attrition
- *Strengthen ties to your membership community



Tiered Services has been simplified into an easy to use Start-Up Kit called CU * PERKS. We've done the work. All you need to do is make a few choices and soon you will be rewarding your members too!

Relax! It's Easy.

What if your members noticed you had a rewards program that would help them save and earn more money?

★ GET IN THE GAME

How many rewards programs do you or someone in your household participate in?

Are you adding up your points for travel or prizes on a credit card? Are you taking your drug or grocery store card with you whenever you shop? Do you plan your shopping around which store will give you the most points or bucks or cash? Even if you don't, millions of consumers do and more and more are jumping into the points game everyday.

CU ★ PERKS...The Competitive Edge You NEED.

When you commit to making CU ★ PERKS an integral part of your sales efforts and your staff understands its value and how to use it as a sales tool, the members will see the value of doing business with your credit union over any other financial institution!

CU ★ PERKS Is All Figured Out for a Quick Launch.

Yes, the work is done! Many credit unions want to use the Tiered Services Rewards Program but find little time to learn all of the flexible features that CU★BASE offers. If you are one of these credit unions, you will appreciate the CU ★ PERKS program.

“Re-Launch” Your Current Program.

If you are one of the credit unions that currently has a rewards program but you are thinking it lacks pizzazz or is ineffective, consider a “re-launch” and kick it up a notch or two! Give your program a face lift with CU★PERKS! Not sure if your program needs improvement? We can help you with a quick member and/or staff survey to find out.

Implementation Made EASY!

All of the tasks and recommendations are organized for you and are included in a CU ★ PERKS Implementation Guide. The set up, communications and marketing materials you need for a successful launch are all there! In addition, you will receive ongoing marketing recommendations to keep your program fresh. It's up to you to make it part of your credit union's growth strategy!

CU★PERKS REWARDS PROGRAM							
Launch Date	Implementation Planning Calendar						
Color Code Here	Task	Description	Delivery Method	Frequency	Channel	Audience	T&D Tools
Program Planning including Plan of Implementation	Sign Up	Communications to CU Members that your credit union is now offering the CU★PERKS Rewards Program	File or e-mail worksheets	One Time	CEO	CU★Member's assigned contact person	Enrollment Form CUB
		Review your calendar for exclusions in regards to what holidays you will be offering to the national market	If existing adjustments to your list schedule allow approval and notify members in the appropriate locations	Statement created and sent via email to all members	One Time	One another Marketing Designate	Fee Analysis Template Fee Schedule Communication CUB
	Set Up Program	Communication Program Quarterly to CU★Members	File or e-mail all of worksheets	One Time	One another Marketing Designate	CU★Member's assigned contact person	Set up worksheet CUB

Implementation Calendar Helps Guide You Through the Easy Set Up Process.

* SIMPLIFIED

It's ALL Figured Out!

* Branding

You are welcome to use the name and logo that is designed to coordinate with CU*Answers' products, CU*PERKS. Or, if you already have a program name, just use that. You can also arrange for a separate customized marketing/branding program. CU*Answers Management Services Team will provide help along the way!

* Training

CU*Answers will provide CU*BASE training to help you understand the technical aspects of the tiered services program. In addition, CU*Answers will provide ongoing training and support to help your staff utilize the cross sales program to effectively talk to members about the benefits of CU*PERKS.

* Planning

A complete Implementation Guide which includes the roll out recommendations and tools for communication to your board, your staff and your members comes with the Start-up Kit.

* Communicating

Various communications are available for you to use as they are, or just take what you like and customize the rest.

* Marketing

You have access to a fully coordinated CU*PERKS campaign through CU*OverDrive:

- * Brochure
- * Newsletter Articles
- * Web Site Banner
- * Web Site Rewards Explanation Page
- * E-mail Text for Member Reach Communications
- * Statement Messages
- * Posters 8.5 x 11 and 22 x 28
- * Postcard
- * Statement Inserts



All of the marketing collateral and promotional materials will be created to support the marketing and branding of the program. These may be customized with your credit union's logo and contact information. If you would like to add an additional sales training component or custom materials to the program, our friends at TAG Marketing are available to assist you.



CU*PERKS
REWARDS PROGRAM

*** To get started contact**

Barb Cooper

P: 616.285.5711 x205 *** T:** 800.327.3478

F: 616.285.7275

bcooper@cuanswers.com

*** For additional consulting contact**

Contact one of the The TAG Team Members:

Kathy Elliott

P: 877tagline ext 250

kelliott@tagconsulting.org

Beth Warden

P: 877tagline ext 252

bwarden@tagconsulting.org



6000 28th Street SE, Suite 100, Grand Rapids, MI 49546
ph:616.285.5711 * tf:800.327.3478
www.cuanswers.com