



Success Story

Strategic Marketing Audit & Plan

“Having an outside firm, like LemmonTree come in and conduct the audit presents a completely objective overview without the clouds of assumptions and opinions. The audit clearly defined the ‘mis-connects’ and the mixed messages we were communicating internally and externally with some important suggestions on how to clearly communicate our brand and message to all our stakeholders and prospective stakeholders.”

*Rich Jones, Vice President of Marketing, Elevation Credit Union,
work done when formerly U of C Federal Credit Union*

The Situation: When he originally joined the Credit Union, Rich Jones, VP of Marketing, wanted to tie the marketing to the strategic plan that the senior management had developed. He had not been in credit union marketing prior to joining the credit union, so he turned to LemmonTree for assistance in bringing a more strategic focus to his department.

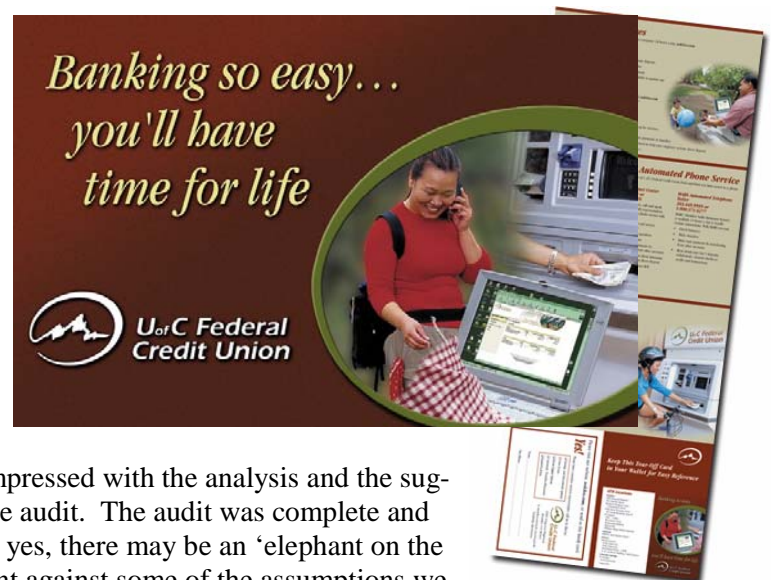
The Solution: LemmonTree Marketing first conducted a Strategic Marketing Audit then used it as the foundation for developing a Strategic Marketing Plan with the marketing team at the credit union.

The Results: After presenting the results of the audit portion, the senior management decided upon the recommendations to include in the marketing planning. A planning session with the marketing department and LemmonTree was held off-site and a strategic marketing plan was developed with an annual focus. The final piece of the project was to have LemmonTree develop a positioning statement and direct mail piece to introduce the new direction of the credit union. “Banking so easy, you’ll have time for life” was the created tagline for the new anytime banking direction to match the outdoor lifestyle of the Boulder community the credit union served.

From Rich Jones, Vice President of Marketing, “Our entire Executive and Senior Management Teams were very impressed with the analysis and the suggested solutions to the challenges that were uncovered in the audit. The audit was complete and very revealing. Nicki was able to show the entire team that yes, there may be an ‘elephant on the table’ and point out the obvious and not so obvious that went against some of the assumptions we had been operating under the senior management team.”

“We were very impressed with the reputation of LemmonTree. They clearly understand the credit union world and the transitions the industry is going through. Quickly understood and embraced the scope and concepts we wanted to accomplish and the execution and follow through was exceptional. What we liked best about working with LemmonTree:

- The completeness of the work,
- The ability to stay within the guidelines and meet the essential timelines,
- The personality of the entire LemmonTree organization,
- The integrity of the work and the analysis and presentation, and
- The team is honest, forthright and professional”



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