



Success Story: MCIF Outsource



“I want to take a few minutes to let you know just how beneficial it has been for us to have worked with LemmonTree Marketing Group for three years. We have gained many valuable insights from your consulting work. You have assisted us with performing a strategic marketing audit, facilitated a member survey, conducted strategic planning sessions with both our board of directors and our management team, and provided a very valuable MCIF analysis. From these consulting projects, we continue to act on the recommendations that were presented to us. For example, the MCIF analysis showed us the power of the MCIF tool for target marketing, product penetration issues, age distribution concerns, and re-pricing opportunities based on product profitability.

Because of your extensive credit union experience, you have been a great partner in jump-starting our marketing and membership initiatives. We appreciated partnering with LemmonTree. You have a great proactive organization.”

Hal Thomas, President/CEO
Community Resource Credit Union,
(Formerly Southwest Resource Credit Union)

The Situation: The credit union’s growth had flattened and the major sponsor groups were not hiring.

The Solution: The LemmonTree team partnered with the credit union to review the market, the position of the credit union and used MCIF to create a new focus on building member relationships.

The Tactical Elements (Two Examples):

- Targeted direct mail in a two-step process driven by MCIF analysis to new members.
- Quarterly offers to the top 10% of their most profitable members to ensure retention.

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