

Success Story Marketing Audit



United Educational Credit Union



Banking is Better at the "U"

The marketing audit LemmonTree developed for our Credit Union was very enlightening. The power point presentation made the case that our Credit Union would benefit by utilizing LemmonTree's recommendations and services.

Roxie Willis, President/CEO

The audit opened my eyes to some opportunities for our credit union. Having someone look at our situation from the outside seems to be extremely valuable.

Jeffrey Stanton, Chairman of the Board

The Situation

The issues facing senior management and the board of directors included:

- Business development issues to draw in more members or move into a community charter
- Ability to conduct demographic and member analysis with market research
- Consideration of small business services and other new products and services
- Aging membership may need the benefit of youth marketing
- The convenience of more online or electronic delivery of services
- Building business around branch locations
- Consistent flow of marketing

The Solution

LemmonTree's Marketing Audit

The Tactical Element

To review the marketing effectiveness and credit union goals, the tools used included:

- Discussions with manager team and front-line staff
- Visit to branches for assessment
- Observation of the operations in the Credit Union
- Review of the marketing materials of the competition
- Review of recent promotions, media ads, newsletters, and other materials

The Results

The recommendations from LemmonTree consultants included:

- Build brand to better differentiate with a new logo, brand graphics and positioning statement
- Expand the brand awareness with a new description told to the public of the FOM
- Utilize a balanced marketing plan that is a mix of targeted direct mail, media advertising, business development, and promotional campaign marketing to be more strategic
- Focus a staff member's time on business development
- Capture outside debt by building more business with existing members
- Make the marketing flywheel spin with targeted direct mail
- Promotional campaigns developed to increase service penetration
- Reach online members through e-marketing
 - Move the staff into a hybrid "service-selling culture" with cross-selling training
 - "Own" a community sponsorship as part of the community involvement program





“The marketing audit provided by LemmonTree was very thorough and packed with good information. The audit provided valuable insights, and in some cases, reinforcement and/or guidance in areas we weren't quite sure about. It is always beneficial to get a fresh perspective and have someone from the outside make suggestions and assist in the implementation of changes. We found the audit to be well worth the money spent.”

- Joan Miller, Administrative Assistant

Next Step

A new logo and positioning statement to update the brand identity and differentiate United Educational CU from the competition.



Old Logo

United Educational
Credit Union



Banking is Better at the “U”

New Logo



Celebrating
22 years.



of Refreshing Marketing Strategy
1984-2006

Ride the wave of results...

with LemmonTree Marketing Group

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