

Sample *Brief of Effectiveness* (category II entries only)

This sample *Brief of Effectiveness* reflects all possible criteria to be included in a brief. Your brief will include similar information as appropriate to your individual campaign.

Credit Union Name: XYZ FCU

Campaign Title/Theme: Quick Card

Product Being Marketed: Credit Card

Beginning Date: April 1, 2006 Ending Date: June 30, 2006

[Situation] After offering credit cards for the past 5 years, we determined too few account holders were signing up for our credit card. Based on current research of credit card enhancements, studies found that credit cards offering enhancements had a higher percentage of card applications. We concluded that our members needed a better understanding of the convenience of credit cards, the enhancements offered, and its low-risk security features. By increasing the number of credit card accounts, we saw an opportunity to increase both member loyalty and provide interchange income to our credit union. The spring to summer timeline was chosen, as members are often on vacation and can enjoy the convenience and security of carrying their credit card instead of cash.

[Objectives] Our objective was to educate potential account holders on the convenience, enhancements and security features of credit cards to help increase account growth and interchange income for our credit union.

[Goal] Our goal was to increase our credit card portfolio among current members by 155% or 90 accounts with a return on our marketing investment of 160%.

[Strategy] Our strategy was to create a full line of low-cost collateral pieces so we could educate our audience multiple times with our advertising message. The campaign collateral materials were developed in-house, which included statement inserts, posters, a Q&A, stick-on buttons, newsletter articles, web articles and flyers. Leading up to the campaign, our staff was provided with refresher training on our credit cards, along with the campaign goals and objectives. We determined that by educating our staff on the promotion, our members were able to have their questions answered and would be encouraged to open credit card accounts through cross-sell opportunities and member inquiries. We also held a fraud seminar—tying in with our educational theme, educating members on how they can protect themselves from fraud with their credit cards and teaching them about credit card security features.

[Theme] The theme of our campaign was “Quick Card.” The tone of our campaign was educational and informative. This complimented our credit union branding, as our image in the community is a credit union that is knowledgeable in financial products and services.

[Audience] The target audience for our Quick Card campaign was existing members without credit cards, ages 25-60.

[Distribution Channels] We included inserts in our quarterly statements, displayed large posters and Q&A at our branches and had our staff wear stick-on buttons. In addition, we included articles in our newsletters, on our website and distributed flyers to our SEGs. Our fraud seminar was held at our main office after hours.

[Results] After 3 months of running the “Quick Card” credit card promotion, we met our goals exactly increasing our credit card portfolio among current members by 155% (90 accounts) with a return on our marketing investment of 160%.