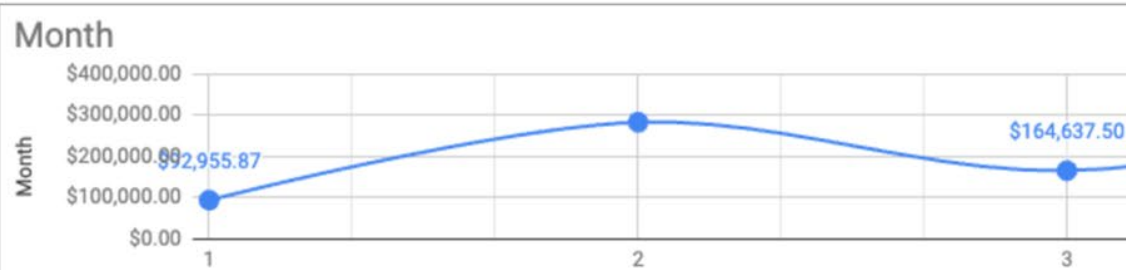


Boosting Membership and Loans: High- Converting Campaign Strategies for Credit Unions



Winning Campaigns Start With Alignment Over Assumptions

A	B	C	D
Year	Month	COUNTA of	SUM of Amount of Loan
+ 2024 Total		63	\$1,879,230.26
- 2025	1	4	\$92,955.87
	2	10	\$282,510.17
	3	4	\$164,637.50
	4	10	\$324,554.56
	5	12	\$362,971.08
	6	4	\$148,633.93
2025 Total		44	\$1,376,263.11





First, Effective Campaigns Start With

Solid Data



Gut Instinct



Google Tag Manager



Google
Analytics





From Campaigns to a Growth Engine

1. Competing in today's digital landscape takes more than impressions.
1. Credit unions need a paid media engine, not fragmented one - off campaigns.
1. Audience -first planning beats channel -first thinking.



The Three Levers of Increasing Performance

1

Targeting

2

Creative

3

Product Offer & Landing page





Targeting Audiences, Not Channels With The Right Data

Targeted social

Direct mail

SEM & display

Out-of-home

Canvassing

Email, sales, etc.





Here's How You Align Buying Journey With Targeting.





Creative: The 5 Attributes of Creative That Drive Action

1

Relevance : address life stages, needs, or local context.

2

Clarity: avoid jargon, make the benefit obvious.

3

Trust : testimonials, community ties, or proof points.

4

Value: more than APR — lifestyle, perks, member benefits.

5

Urgency: subtle nudges that prompt action now.



1

Brand Focused

2

Product Focused

3

Interest Rate Focused

4

Community Focused Ads

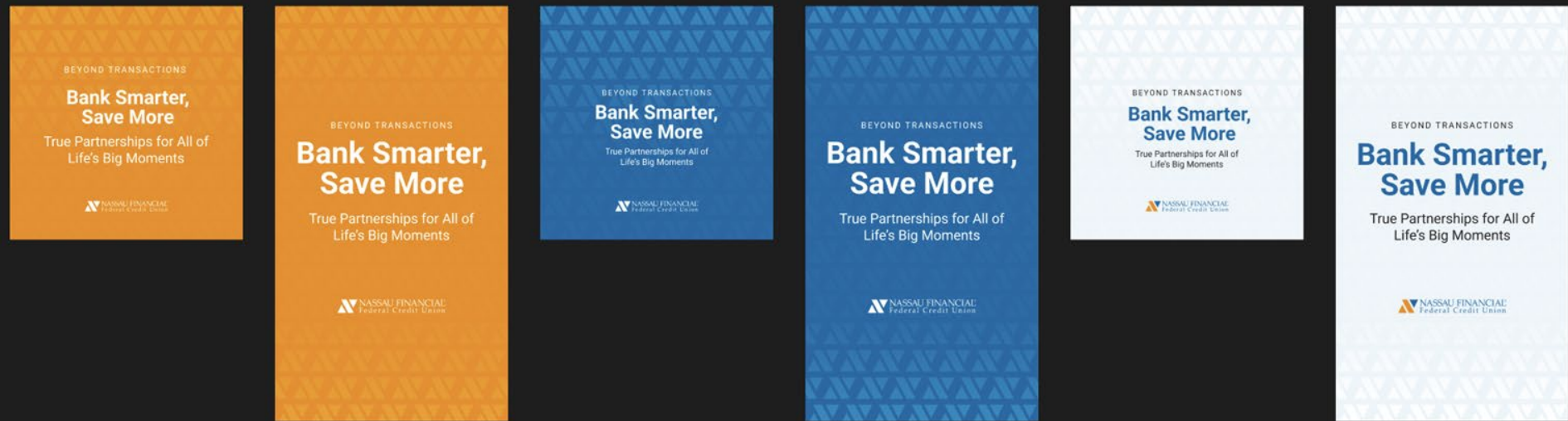
5

Education Focused Ads

Creative Playbook: 5 Ad Categories To Build For A Successful Campaign



Brand Focused Ad Example



Build trust & credibility.



Product Focused Ad Example

STABLE RATES, ENDLESS ROADS

**No Surprises with
Nassau - Even After
24 months.**

**Apply for an Auto
Loan today.**



STABLE RATES, ENDLESS ROADS

**No Surprises with
Nassau - Even After
24 months.**

**Apply for an Auto
Loan today.**



STABLE RATES, ENDLESS ROADS

**No Surprises with
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**Apply for an Auto
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STABLE RATES, ENDLESS ROADS

**No Surprises with
Nassau - Even After
24 months**

**Apply for an Auto
Loan today.**



Promote specific pain
point/solution.



Interest Focused Ad Example

1080x1080 - 1.1

Drive Your Dreams Forward

Revitalize your commute with a new ride and lower payments!

New Auto Loan	Used Auto Loan
6.29% ^{APR}	6.49% ^{APR}
<small>For rates up to \$15,000</small>	<small>For rates up to \$15,000</small>

APR is subject to credit review. See dealer for details.

1080x1080 - 2.1

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1080x1080 - 3.1

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1080x1080 - 1.2

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1080x1080 - 2.2

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1080x1080 - 1.3

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1080x1080 - 3.3

Drive Your Dreams Forward

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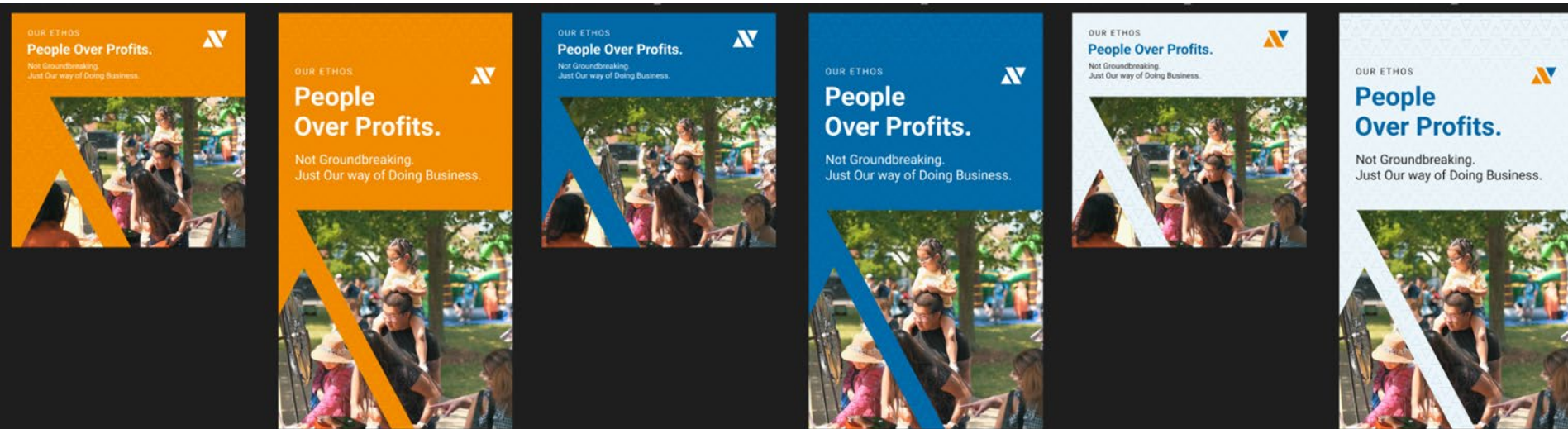
New Auto Loan	Used Auto Loan
6.29% ^{APR}	6.49% ^{APR}
<small>For rates up to \$15,000</small>	<small>For rates up to \$15,000</small>

APR is subject to credit review. See dealer for details.

Highlight
competitive
rates.



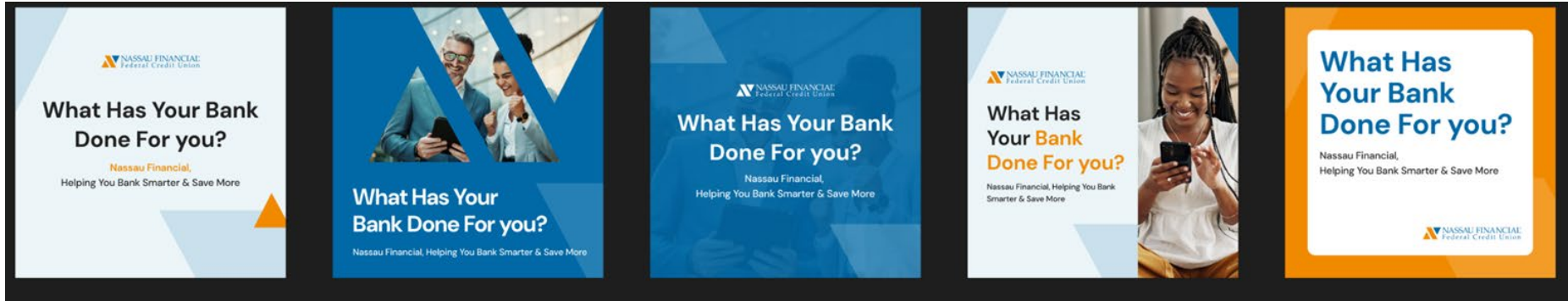
Community Focused Ad Example



Show community
impact.

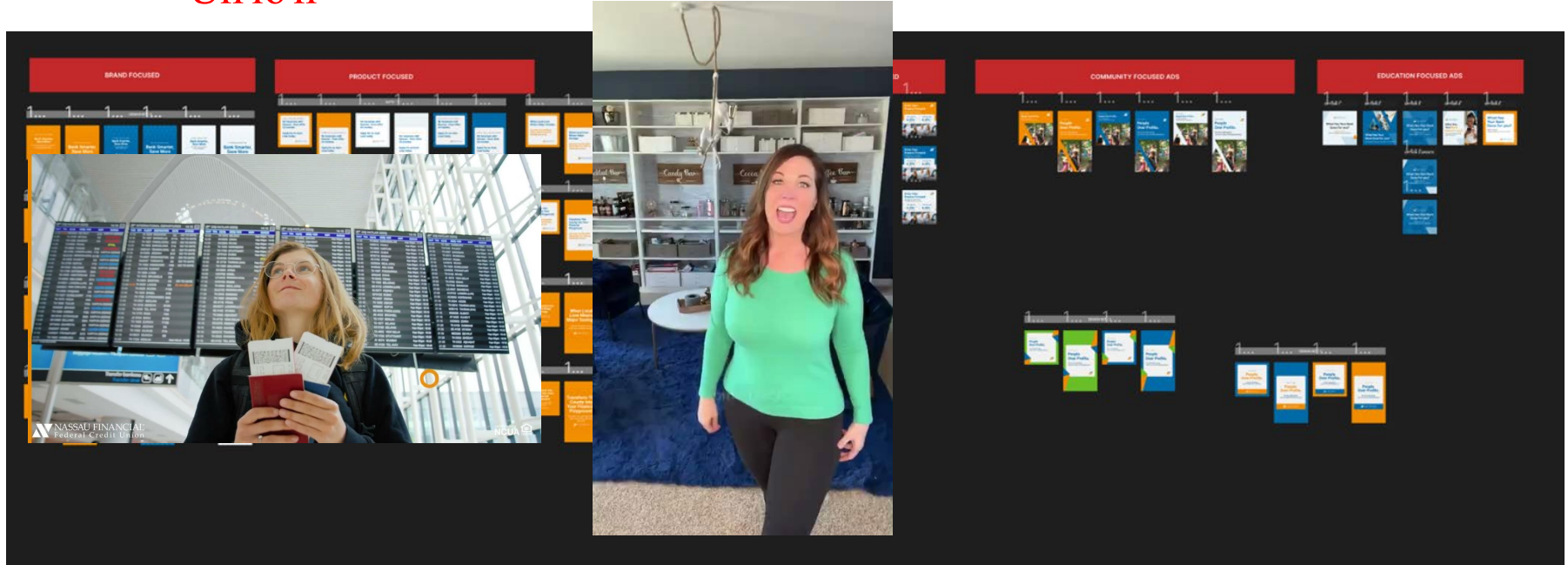


Education Focused Ad Example



Show community
im p a c t.

Create The “Marvel Universe” Of Your Credit Union





Improve Creative Performance By Looking At The Following Metrics:

1

Top Creative Category

2

Top Copy

3

Top Video Hook (engagement + thumb scroll stop rate)



Where the Click Becomes a Conversion

Avoid Information Overload.

The screenshot shows a bank website with a blue header. On the left, there is a 'menu' button with a hamburger icon. On the right, there is a 'Login' button with a padlock icon and the text 'online banking login' and 'sign up for online banking'. Below the header, there is a blue banner with the text 'Thank you for nominating us in 4 categories!' and a list of categories: 'Best Credit Union', 'Best Financial Institution', 'Best Mortgage Company', and 'Best Mortgage Officer: Bridget'. To the right of the banner is a 'BEST of READERS' CHOICE AWARDS 2025' badge. Further right, there is a blue button with the text 'Vote for us daily thro by clicking this'. Below the banner, there is a grid of six tiles, each with a photo and a text overlay: 'Open an Account' (woman at desk), 'Member Essentials' (woman and man at desk), 'Student Accounts' (group of four students), 'Promotions' (man and woman holding money), 'Loans' (woman and man at desk), and 'Auto Loans' (woman driving a car).

menu

online banking login
Login
sign up for online banking

Thank you for nominating us in 4 categories!

- Best Credit Union
- Best Financial Institution
- Best Mortgage Company
- Best Mortgage Officer: Bridget

BEST of READERS' CHOICE AWARDS 2025

Vote for us daily thro
by clicking this

Open an Account

Member Essentials

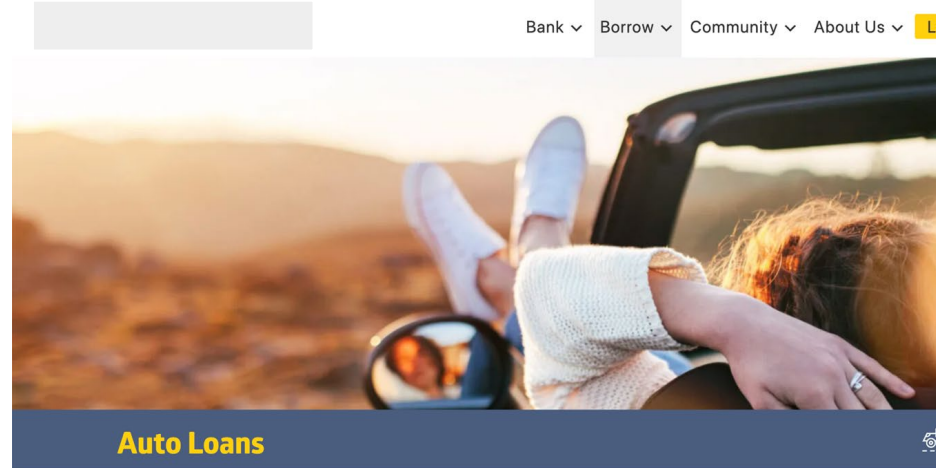
Student Accounts

Promotions

Loans

Auto Loans

Avoid Lack Of Call To Actions.



Avoid Generic Landing Pages

🏠 / [Loans](#) / Credit Cards

Credit Cards

Escape Sky-High Rates!

There's no balance transfer fee!

Benefits Include:

- NO annual fee
- NO balance transfer fee
- NO cash-advance fee
- NO over limit fee
- NO convenience fee
- Non-variable rate
- 25-day grace period on non-revolving balances on purchases only
- Annual cash rebate program offered with VISA Credit Card
- 7% for ALL Cash Advance transactions!

[Apply Now!](#)

To activate or report your card lost/stolen please call 866-928-9237

REWARD YOURSELF THE EASY WAY WITH

Search

Search the site...

[submit](#)

→ [Online Banking](#)

→ [Wealth Management](#)

→ [ATM Locator](#) **OVER 28,000 ATMs**

→ [Educational Tips & Tools](#)

→ [Events & News](#)

→ [School & Community Partnerships](#)

→ [Quick Links](#)

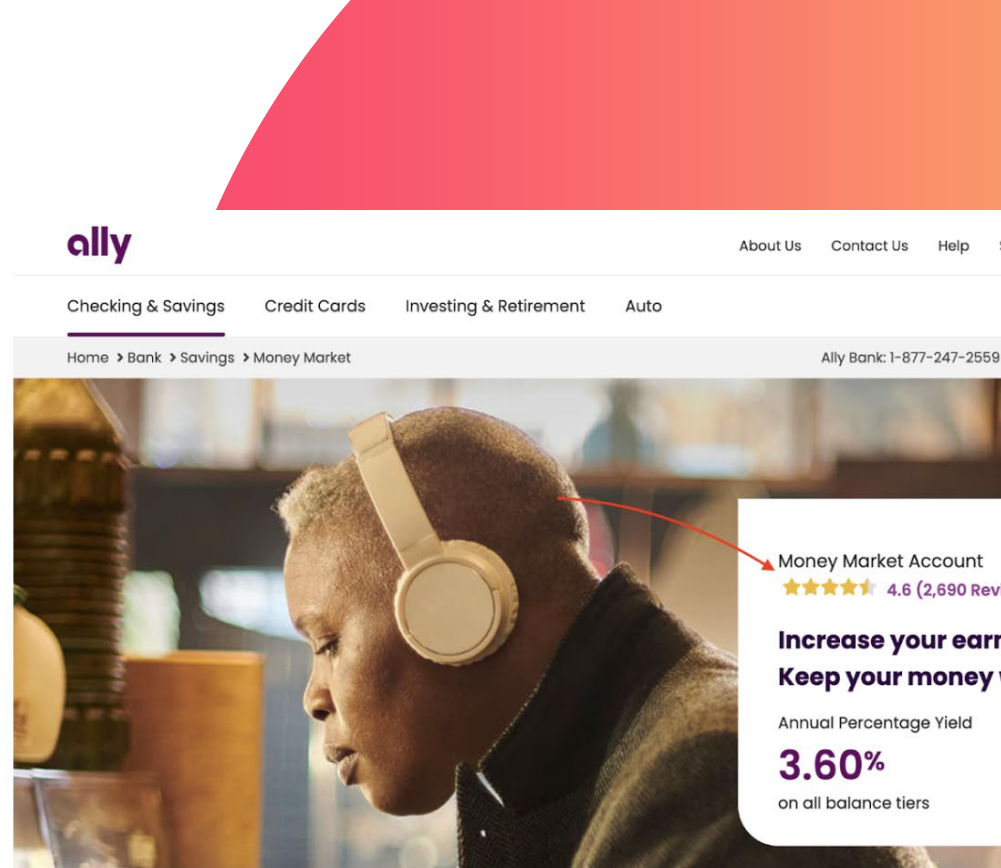
→ [Reorder Checks Online](#)

→ [Retail Benefits](#)



Do: Establish Trust On The Landing Page

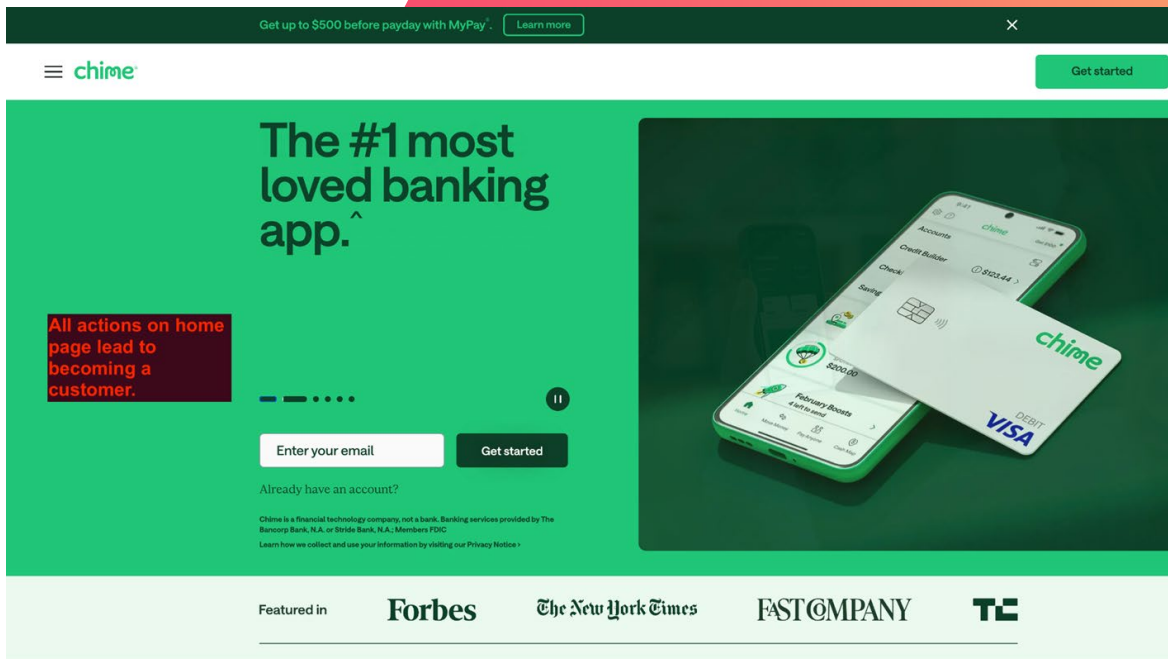
- Feature reviews and testimonials in visible but non-intrusive ways
- Incorporate trust signals above the fold so users see it right away
- Display trust symbols like NCUA logos, FDIC, Google Review, etc.





Do : Minimize Distractions

- Avoid excessive site-wide navigation links on product pages
- Limit secondary CTAs to the most important action
- Reduce header & footer clutter with only the most essential links



Chime® is a financial technology company, not a bank. Banking services provided by The Bancorp Bank, N.A. or Stride Bank, N.A. Members FDIC. Learn how we collect and use your information by visiting our Privacy Notice >





Do: Get Contact Information Fast

- Capture member data before the application
- Use email automations too enabled abandon application follow ups.
- Ensure all information you filled out on the main website is automatically added to the LOS application.



We Help Keep Your Monthly Car Payment Within Your Budget.

Our Auto Loan Rates are competitively low in Nassau County, ensuring your monthly payments are comfortably affordable, ensuring your monthly car payments are easy on your wallet.

New Car Loans As Low As

5.49% APY*

For terms up to 72 months

Used Car Loans As Low As

5.79% APY*

For terms up to 60 months

Name *

Phone Number *

Email Address *

[Apply For This Rate](#)



Yes, These Tactics Work...



Nassau Financial

Develop a landing page redesign strategy in combination with monthly A/B Tests for HELOC & Mortgage landing pages.


Applied Best practices yielded:

- HELOC form conversion rate 17%
- Mortgage form conversion rate 10.3%
- Both were below 3% before redesign + tests.



Yes, These Tactics Work...





We Help Keep Your Monthly Car Payment Within Your Budget.

Our Auto Loan Rates are competitively low in Nassau County, ensuring your monthly payments are comfortably affordable, ensuring your monthly car payments are easy on your wallet.

New Car Loans As Low As

5.49% APY*

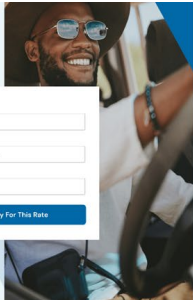
For terms up to 72 months


Used Car Loans As Low As


5.79% APY*


For terms up to 60 months


[Apply For This Rate](#)



 No Closing Costs

 No Application Fees

 No Annual Fees


 No Annual Fees

Helping Nassau County Bank Smarter




Deal With Humans - Not chatbots

The goodbye to automated messages and time-consuming chatbots -- when you work with us, you'll deal with real people every step of the way.



Rate reduction with auto pay

It's a win-win situation - you'll enjoy peace of mind knowing your payments are taken care of, and you'll save on interest costs.



GAAP insurance available

The ultimate protection for auto loan borrowers, covering the gap between your vehicle's value and loan balance in case of a total loss.

[Learn More](#)

Don't Wait, Apply & Save

[Begin Process with Representative](#)

Bank Smarter. Save More With Nassau Financial

★★★★★

"I did not know what to expect when I contacted NFFCU for a loan. My loan originator, Rhonda, was very pleasant, professional, kind and patient. I truly appreciated her professional demeanor and her knowledge of the subject."

- Jo A.

★★★★★

"I highly recommend this credit union for obtaining a loan. The team at Nassau Financial is knowledgeable, very responsive to questions and requests, and very professional. The interest is low relative to other banks in the area."

- Jo A.

* Terms & Conditions
1. APR (Annual Percentage Rate). All loan types, rates, terms and offers are based on applicant's credit history and are decided based on creditworthiness and other criteria. Other rates and terms available. Certain restrictions apply. Minimum loan amount is \$5,000 and assumes discounts for Auto Pay & Direct Deposit. No further discounts apply. Rate offers quoted. Terms & Conditions may change at anytime. Minimum loan amount on 60-month term is \$10,000. Vehicles with commercial plates cannot be financed as a consumer auto loan. To qualify as new, vehicle must be current model year or one-year prior model with less than 5,000 miles. Vehicle model cannot be more than 7 years old, including the current model year. Auto Loan rates assume LTV 90% or less.

Offers subject to change without notice. Membership is open to those who live, work, worship, go to school, or volunteer in Nassau County, NY.





Recap of a High Converting Web Page

1

Improve Visual Hierarchy

2

Minimize Distractions

3

Highlight Primary Offers

4

Establish Trust Throughout the Site

5

Get Member Information Fast

6

Build Out Personalization

7

Get Feedback & Improve

The Offer is the Foundation.

The offer must:

- Be competitive in your market (rates, incentives, or benefits, minimum deposits)
- Align terms with the audience's pain point or goal
- Provide real, tangible value vs. "generic" promises
- Be simple and easy to understand at a glance

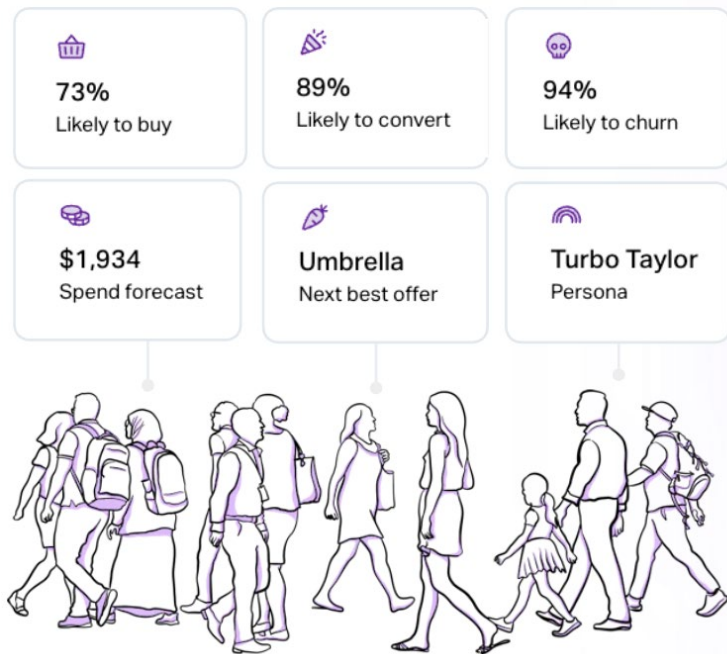
Data Powers the Engine

- Ensure measurement has
 - Analytic programs are correctly setup
 - CRM are actively updated and maintained
 - Clean data keeps the engine running.
 - Data ensures spend is guided by insight, not guesswork.

Predictive Data in Advertising

- Identify high -intent members before they raise their hand
- Segment by demographics, life stage, financial goals
- Deliver personalized offers at scale
- Build predictive models to create personas, score leads, and recommend next product.

Mission Disrupt AutoML Models™





Top Use Cases for Credit Unions



First Best Product

What financial product(s) should we display during outreach?

Score every lead on their likelihood to get all the product offerings or product categories, then rank the most likely to least likely. Then add them in email series or outreach funnels.



Next Best Product

What financial product(s) should we display next?

Identify the best next product (checking account, auto loan etc.) to display to existing members and maximize their lifetime value. Then add them in email series or outreach funnels.



Churn Scoring

Which members are likely to churn?

Score every member on their likelihood to churn, then target highest scoring individuals in an intervention campaign to prevent them from “falling off”.



Data Appends

How do we get better data on our customers and leads?

Hydrate customer and lead file with identity data sourced from best in class vendors.



Personas

Which segments exist within my member base?

Understand the attributes that distinguish your customer base so you can adjust messaging and creative to directly address each segment.



Direct Mail

Who should we send mailers to?

As direct mail gains traction, we can help identify which prospects or clients should receive a mailer to maximize the spend.

How To Build A Budget To Hit Deposit & Loan Goals.

Sign Up For The Guide .



Alex@missiondisrupt.com

