

CU*BASE
Integrates
CRM tools
into features
you use every

ASAP

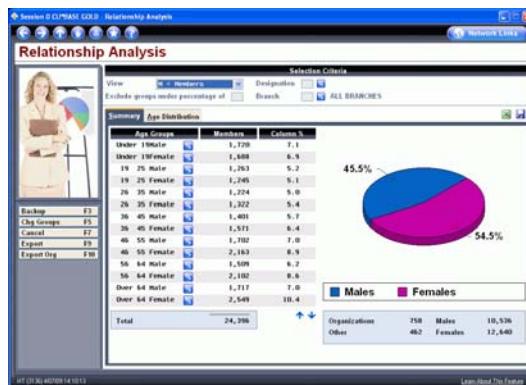
Ask See Act Profit

APRIL 9, 2009

Ask the question and

- Research using CU*BASE tools
- See the results on your screen
- Act and send messages to members using "Member Connect"
- Profit both your credit union and your members

Use Report Data and "Member Connect" to Communicate



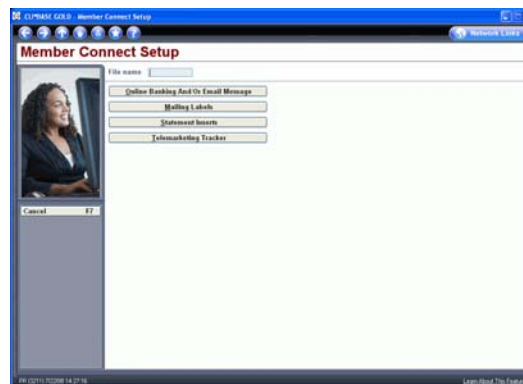
Use MNMGMA #8 Relationship Analysis to analyze your membership ages 17-25 years old.

1

Say you are analyzing members ages 25-35 years old on an online report. Wouldn't it be great if you could just quickly send a targeted email message to them? With many CU*BASE features, you can do just that. Simply export the data to a file for use with "Member Connect" containing only the members' account numbers.

2

Move to the "Member Connect" screen and enter the file name.



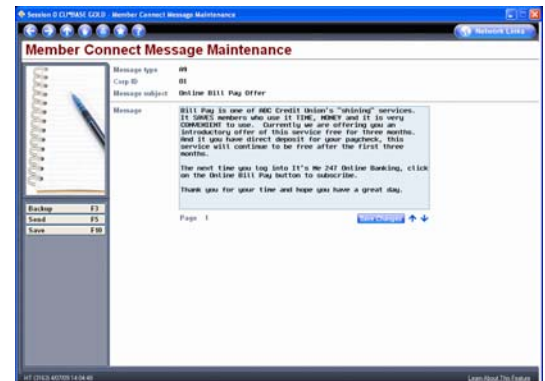
Use MNMRKT #13 or MNPRTC #28 "Member Connect" Marketing Tools to select to send an email message.

3

Select your type of communication, for example by email message.

4

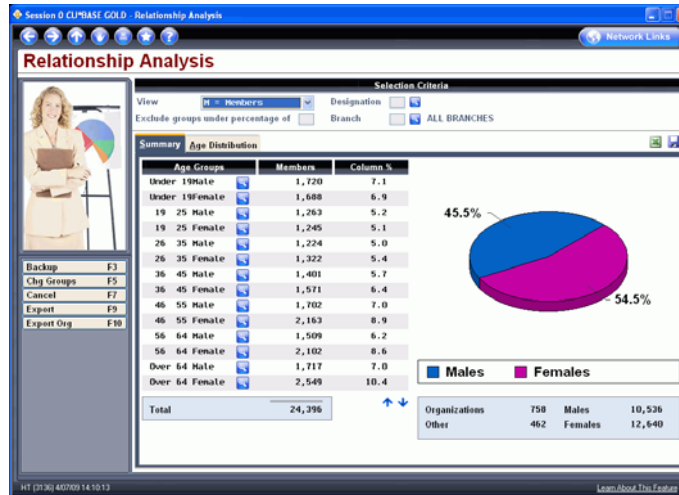
Copy the text from a pre-written message stored in the "Talking Points" message library or compose it yourself. Then send the email message to the 25-35 year old members you selected on the initial CU*BASE report.



Send these members an email message alerting them of your new credit union offering.

Relationship Analysis

Shown on the cover of this brochure, Relationship Analysis is a multi-use online report that allows you to quickly check the age and gender demographics for your members AND non-members.

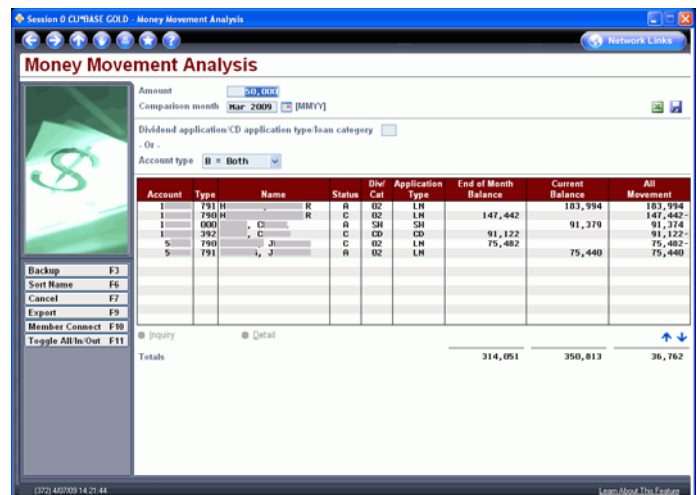


Drill down further from this screen to contact just the specific age range you want to contact. Then use Member Connect to send an online banking message or email message to only this group.

Use MNMGMA #8 Relationship Analysis to come to this screen. Click on the symbol to view demographics for a specific group.

Money Movement Analysis

Money Movement Analysis helps you determine which members have moved larger sums of money in and out of your credit union. Use the export feature on this screen to contact them and ensure you keep their business.



Use this screen and Member Connect to keep in contact with members moving large amounts of money out of their accounts with you!

MNMGMA #18 Money Movement Analysis brings you to this screen.

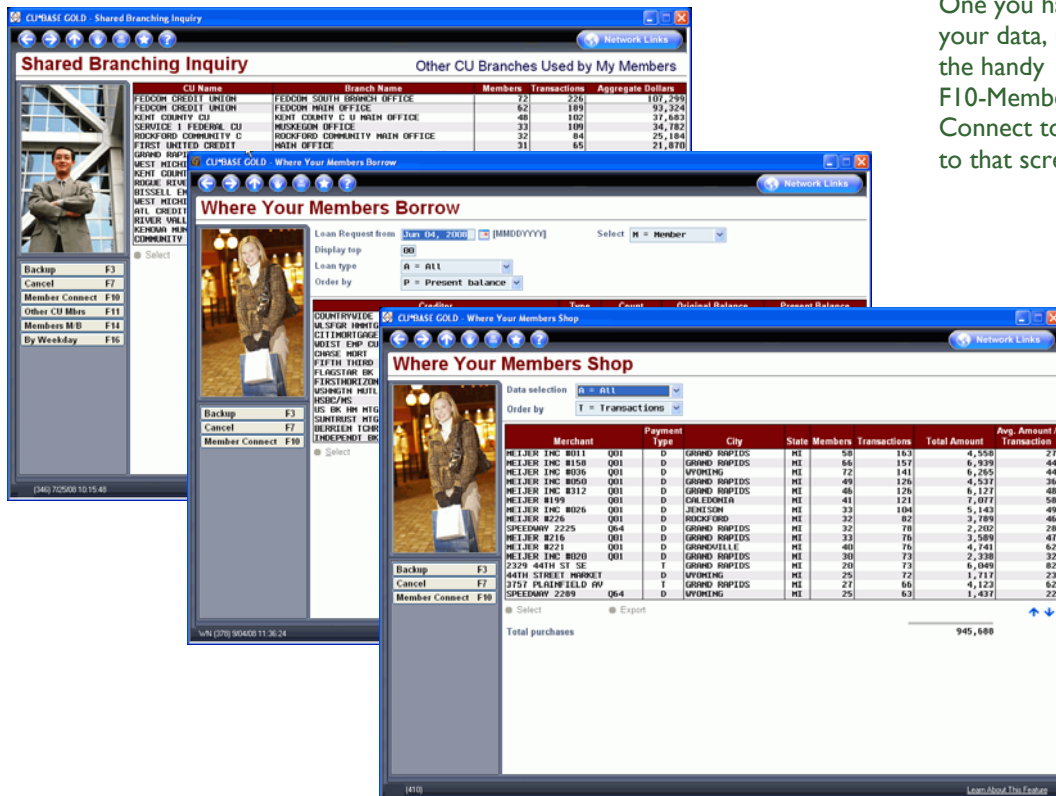
CU*BASE has lots of tools that make it easy to send targeted messages to just the members you want to contact.

Where Your Members Tools

Use the Where Your Members tools on MNMGMA to find out where your members do business.

- Use *Where Your Members Shop* and contact your members with special savings at stores they frequent.
- Use *Where Your Members Borrow* to notify members about new loan rates.
- And use *Where Your Members Branch* to let your members know about new weekend hours at your branches.

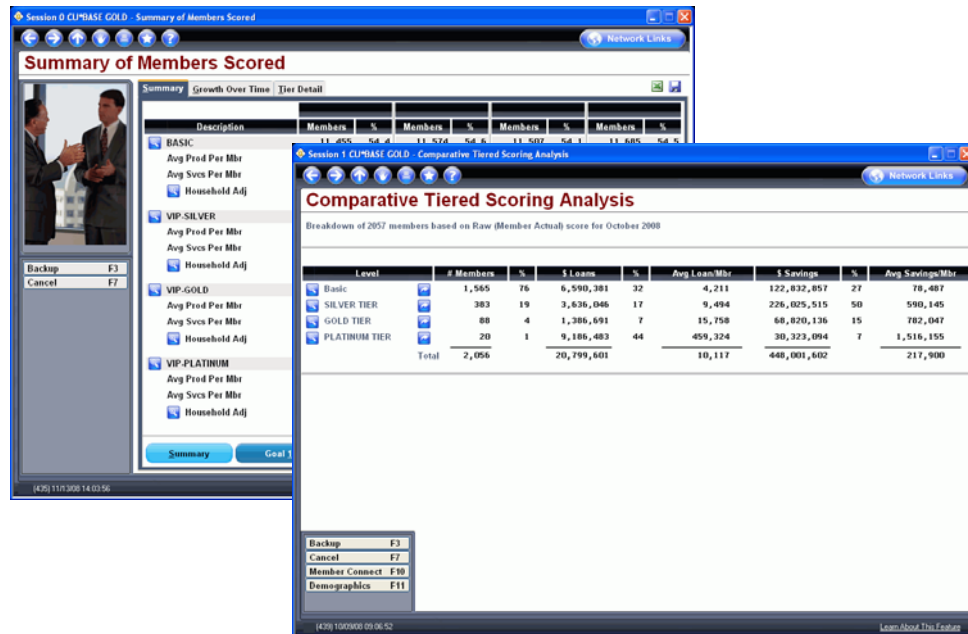
All the data from these screens can be exported to file ready for Member Connect. Then use the handy F10-Member Connect to go to that screen and contact them directly.





One you have your data, use the handy F10-Member Connect to go to that screen!

Tiered Scoring and Member Connect A Winning Combination!

Tiered Services
and Member
Connect help you
get your message
out only to specific
members.



Select MNMRKT #25 Tiered Svcs Monthly Comparison and press Enter. Select the Tier you want to contact and click the  symbol to come to this screen.

Here's another method! Want to send a message based to specific members based on their Tiered Services level? From any of these detail screens, click on the  arrow to export the data. Then click Member F10-Connect and send off an email message to your Platinum members.

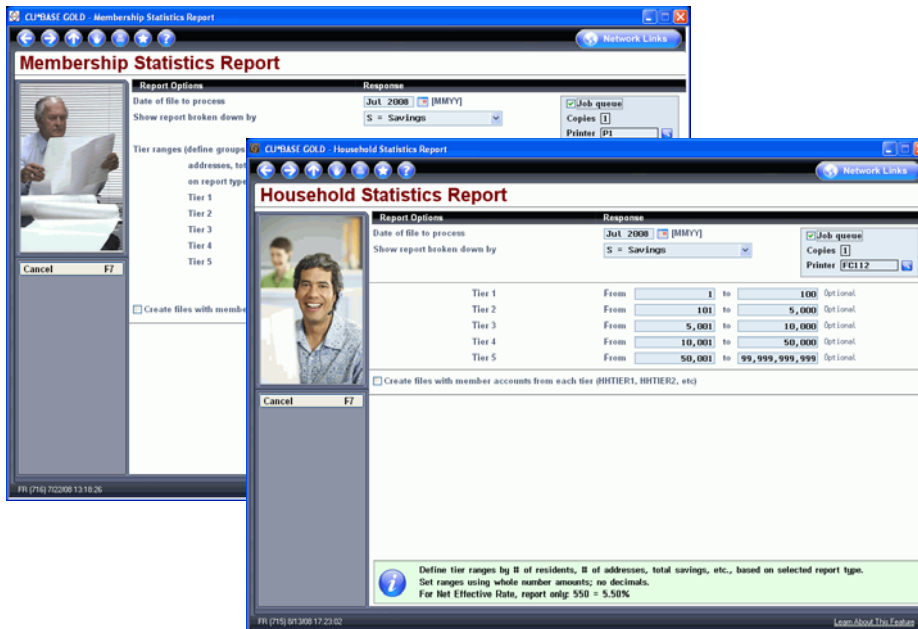


You can even narrow your selection to include only members who use Online Bill Pay and just send messages to these members!

Select Goal 4 from the top screen show on this page to analyze your members use of services such as Bill Pay and Online Banking.

Use Tiered Household Data

You can even analyze your household data using Tiered Scoring! Look at how your members and households are performing by Tier. Then use this information in a new marketing campaign.



Use MNMRKT #19 Household Stat Rpt-by Household and MNMRKT # 20 Household Stat Rprt-by Member to find this data.

Contact Members with Higher Balances

Want to contact members with high loan balances? Or just those with any balance over a certain amount? The Aggregate Balance Reporting tool gets the job done! Use this report to communicate with these members.



Use MNMRKT #12 Aggregate Analysis/File Build to come to this screen to run the report.

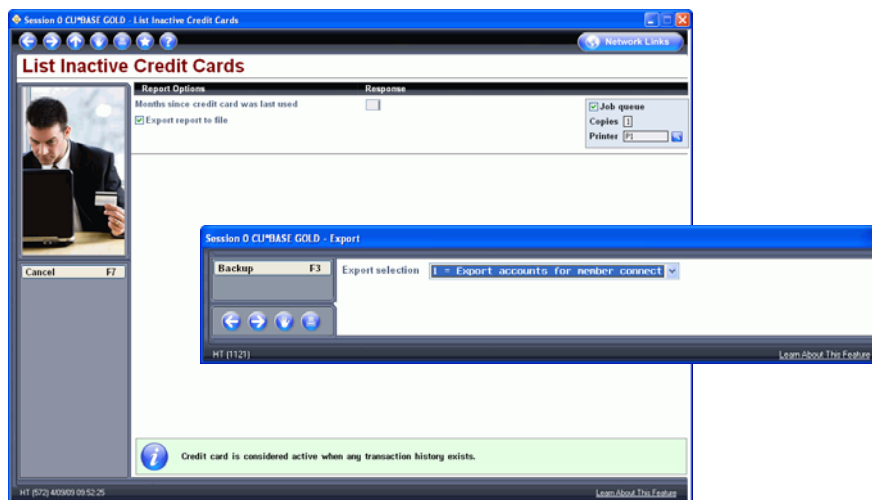
Export Data From Printed Reports

You can export data directly from many CU*BASE printed reports as well, and the list of them keeps growing! Once you have made your selections on the screen, simply check the “Export report to file” option and press Enter. From the resulting screen choose “Export accounts for Member Connect” to create a file with account numbers only.

Then move to the “Member Connect” screen to contact these members via email, home banking, mailers or notices in their statements.

It’s very easy since this feature is already built right on the screen in CU*BASE! Look for more of this to come...

These targeted reports and Member Connect give you a powerful way to communicate with your membership.



It’s easy to create the file for Member Connect since the option is built right into the screen!

Select MNRPTE #24 List Inactive Credit Cards to export a file to communicate with these members.

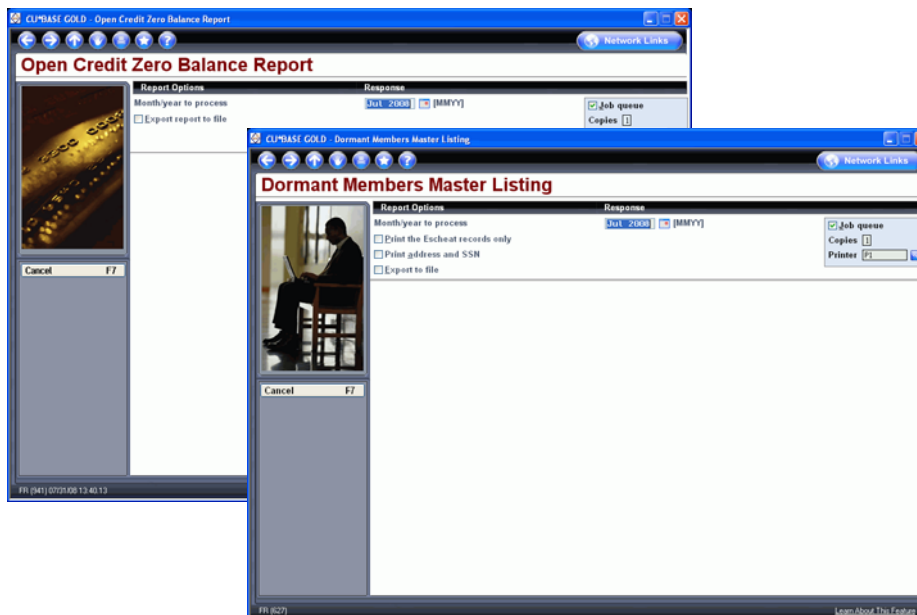
For example, you might use the report shown above to contact members who have not used their credit cards in a while and encourage them to take advantage of your program’s great rates. Or use the Closed Membership Report to contact people who have left your credit union and encourage them to do more business with you.

See the Theme...? Get the Idea...?

There are many reports in CU*BASE that allow you to export information directly to a file that can be used in Member Connect including:

MNRPTB #1	Trial Balance Select Information
MNRPTB #2	Trial Balance Listing
MNRPTB #6	Closed Membership Report
MNRPTB #7	Closed Member Account Report
MNRPTB #12	CD Selective Trial Balance
MNRPTB #17	Dormant Member Master Listing
MNRPTB #19	Member Auto Transfer Report
MNRPTB #21	Member Uncollected Funds Report
MNRPTB #23	Member No Statement Report
MNRPTC #27	Fee Waiver Information Report
MNRPTD #7	LOC Credit Analysis
MNRPTD #9	Loan Maturity Analysis
MNRPTD #10	CD Maturity Analysis
MNRPTE #12	Zero Balance Line of Credits
MNPRTD #18	Member Insurance Analysis
MNRPTE #2	Selective Loan TB/Statistics
MNRPTE #23	List Overlimit Credit Cards
MNRPTE #24	List Inactive Credit Cards

These are just a few examples of CU*BASE printed reports that can also export files for use with Member Connect.



Communicate with Members Using Member Connect

All the files you can export from the screens in this booklet can easily be used with the Member Connect feature in CU*BASE. This multifaceted tool allows you to quickly send online banking and email messages to your members. Also use this feature to create mailing labels, statement inserts and telemarketing trackers to use with your marketing campaigns. It's easy with Member Connect!



Want to learn more about exporting files to Member Connect and using its features? Check out our Member Connect booklet to learn more about how to start marketing campaigns with this tool.



1060 Springhill Ave
Mobile, AL 36604
<http://www.cusouth.com>