

Market to Your Members—Directly to Their Printed Statement!

Introducing Statement “Onserts”: a New Way to Advertise to Your Members

Tired of members just throwing away your marketing materials when they receive their statement? Want a way to ensure they get your message?

Try adding statement “onserts” to your members’ printed statements! When members review their account balances, they will be sure to see this graphical advertising message you have added directly to their printed statement.

Use statement onserts in place of statement inserts...or in addition to them.

And statement onserts have a distinct advantage over the printed inserts, pricing. Onserts cost a fraction of the traditional printing method.

Statement of Account

Send inquiries to:
FOCUS Credit Union
1800 WY4000 Main Street
Monroeville, PA, WI 53051
Ph: (262) 255-0833

0001 member

From: 3/01/09 To: 3/31/09 Member #: 99999999

Debit Card Changes Coming Soon!
Do you know your options?
For help deciding if Overdraft Privilege is right for you, please call, click or stop by your Credit Union today!

MEMBERSHIP SUMMARY INFORMATION FOR MEMBER # 99999999 AS OF 3/31/09
YOU EARNED 36 MEMBER REWARDS POINTS. YOUR NEW LEVEL WILL BE: BRONZE
ASK HOW TO TAKE ADVANTAGE OF NEW PRODUCTS AND SERVICES TO EARN GREAT REWARDS

000 REGULAR SHARES

Date	Transaction Type	20	34
3/01/09	Beginning Balance		34
3/13/09	REG SAVINGS DEPOSIT		
3/31/09	Ending Balance		

786 LINE OF CREDIT (*)

Date	Transaction Type	13 <th>13 </th>	13
1/01/09	Beginning Balance		13
1/23/09	LOC CASH DEBIT/REDEMPT	26	
2/28/09	L.O.C. PAYMENT	23	
3/28/09	L.O.C. PAYMENT	23	
3/31/09	Ending Balance		

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Support Earth Day.
Switch to e-statements
and save a tree.

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Ring in the New Year
with Lower Rates

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Find all of these onserts at <http://www.marketing/cuanswers.com>, free of charge. Want a customized graphic? Contact our Web Services team.

Target Your Members with Selective Statement Onserts

Want to tell members without a line of credit about your great LOC rates?

Want to target members over 55 about your great senior programs?

CU*BASE Statement Insert and Mailing Instruction tools now allow the inclusion of a separate file including these members to receive a selective statement onsert on their statements.

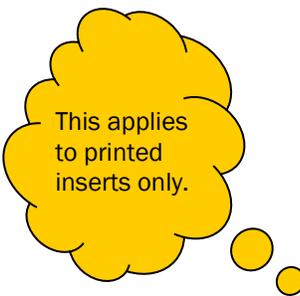
Similar to elective statement inserts, CU*BASE selective statement onserts allow you to target these members with a customized graphical marketing message.

You can even use both selective statement methods – and use selective statement inserts and onserts to get different messages out to distinctive groups of members.

Step 1: Develop Your Graphical Marketing Message and Graphic

The first step towards creating a statement onsert or selective statement onsert is, to create the marketing materials, in this case, the onsert itself. Specific requirements for the onsert may vary based on your Statement Print Vendor.

To assist you in this process, CU*Answers has developed onserts which can be used, free of charge. These onserts have been developed for many existing campaigns with the plan to include this offering with all campaigns in the future. Find these onserts at: <http://marketing.cuanswers.com/>



Session 0 CU*BASE GOLD Edition - ABC CREDIT UNION
File Edit Tools Help

Statement Insert/Mailing Instructions - Format MN

Updated by:
For the period ending: [MMYY]
Total # of paper inserts:

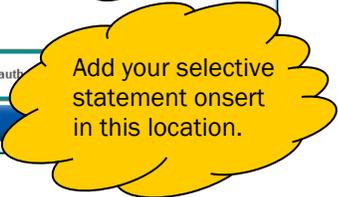
Description of Insert	Instructions for Late Arrival	Leftover Pieces	All or Selective	Selective Files	
				Count	Name
Paper Inserts					
1 COURTESY REPLY ENVELOPE		Hold at printer	Selective		STMT01
2 ZOOGL E INSERT	<input checked="" type="radio"/> Proceed <input type="radio"/> Wait	Return to CU	Selective	614	STMT02
3 \$SUPER \$SAVER INSERT	<input checked="" type="radio"/> Proceed <input type="radio"/> Wait	Return to CU	Selective	370	STMT03
4 NEXGEN MONEY CLUB INSERT	<input checked="" type="radio"/> Proceed <input type="radio"/> Wait	Return to CU	Selective	304	STMT04
5		N/A	N/A		STMT05
Selective Onsert					
6 SELECTIVE INSERT		N/A	Selective	614	STMT06

Primary destination of statements:

Skip Remember that artwork (including a default onsert, if any) must be specified and authorized.

Selective Insert Files

Navigation icons: back, forward, up, down, print, refresh, help, search, @



To print a selective statement onsert you must generate and name the STMT06 file by the 10th of the month.

Additional steps are required for selective statement onserts, including creating a file and naming the selective statement onsert on the screen shown here.

Step 2: (Selective Onserts Only) Create and Name the File of Selected Members

When using Selective Statement onserts, the next step is to create the file containing the members to receive the targeted marketing materials. For *selective* statement onserts it is crucial that this file be named STMT06. This database file must be run and generated by the 10th of the month. (Please remember to refresh the Query at the end of the month.)

For complete instructions for creating this file and preparing it for delivery with the CU*BASE Statement Handling Instructions refer to the “Selective Marketing through Printed Statements” booklet: http://www.cuanswers.com/pdf/cb_ref/S-SelectiveStatementInserts.pdf

Step 3: (Selective Statement Onserts Only) Name the Selective Onsert in CU*BASE

Another step needed only for *selective* statement onserts is to name the selective statement onsert in the CU*BASE Insert/Statement Handling Instructions. To do this, use the Statement Insert/Mailing Instructions screen, shown on the previous page. Access this screen via *Update*

Statement Messages/Inserts on the Member Communication (MNPRTC) menu. On this screen simply name the selective statement onsert in line six and confirm that the file count is included on the screen, indicating that the file has been run and is ready for delivery.

Step 4: Upload the Graphic to Your Statement Print Vendor and Manage the Printing

For both regular and selective statement onserts, you will need to work directly with your Statement Print Vendor for the administration and printing of the onsert. You will need to upload the onsert in the required format and dimensions to their website and communicate with them about placement and costs. Below is an example of how one vendor handles this administration of onsert graphics.

Work with your Statement Print Vendor to upload the graphic and manage the printing of the statement onsert.

The screenshot displays the SAGE DIRECT CU*Answers CU's Statement Processing Onsert Administration interface. The interface is divided into several sections:

- Navigation Sidebar:** Includes options like History, Upload Onsert (with a sub-menu for months: July, August, September, October), FAQ, My Profile, and Logout.
- Header:** SAGE DIRECT logo and CU*Answers CU's Statement Processing Onsert Administration.
- Options:** A section with a "Your changes have been made" message and buttons for "Approve / Finalize" and "View Proof".
- DEFAULT ONSSERT:** A table with columns for Statement Cycle, Required Onsert Size, and Onsert / Description. It shows a default onsert for JUL 2010 with a size of (8.00" x 1.50") and a description of "New Years". A preview of the graphic shows the text "Ring in the New Year with Lower Rates".
- SELECTIVE ONSSERTS:** A table with columns for Statement Cycle, Selective Onsert Number, Required Onsert Size, and Onsert / Description. It shows a selective onsert for JUL 2010 with a number of 1, a size of (8.00" x 1.50"), and a description of "skiing_onsert.pdf VISA Members". A preview of the graphic shows the text "What will you spend your savings on?".
- Footer:** Copyright information for Sage Direct, Inc. and contact details for RALEIGH AVE SE, GRAND RAPIDS, MI 49512.

Note how the top section allows for the upload of a default onsert graphic, while the bottom allows for the upload of a selective onsert graphic. This way you can include the selective statement onsert on a specific set of members and the default statement onsert on the statements of the other members.

Pricing for Statement Onserts

The cost of selective statement onserts is quite reasonable. Following is a listing of the expenses associated with this feature:

Item	Pricing
Delivery of File with Statement Instructions	Free (only used with selective statement onserts)
Administration Fee for Onsert Printing	Refer to your Statement Print Vendor for pricing.
Per Statement Fee for Onsert Printing	Refer to your Statement Print Vendor for pricing.

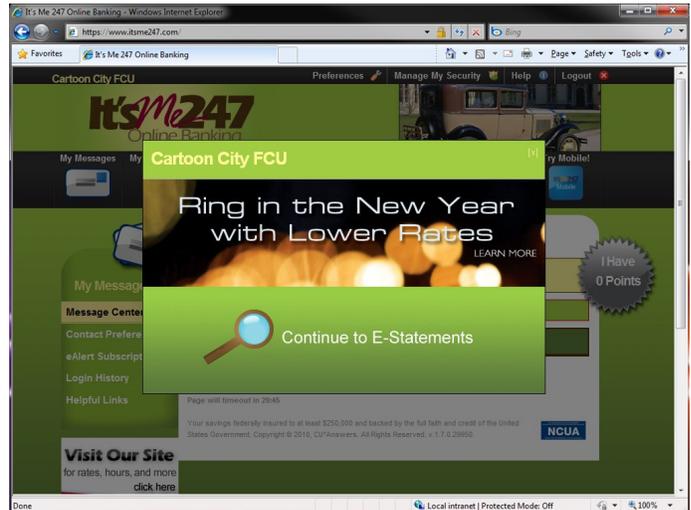
What About My eStatements?

Have you been thinking, "This is great for my printed statements, but what about my eStatements?"

Consider using e-Info offered by Xtend to get your marketing pieces out to your members who no longer receive paper statements.

E-Info allows you to present the marketing message immediately following the members selection to view their eStatements, or provides a jump page allowing them to select to view it.

Interested in this service? Contact Xtend at info@xtendcu.com for more information.



What about your members who receive e-Statements instead of printed statements? Use e-Info to reach these members!

Check Out Our Other Resources!

Refer to our CU*BASE Reference Page for more detailed information.

Statement Printing & Mailing Instructions

For Statements, Recommended For

Selective Marketing through Printed Statements

INTRODUCTION

CU*Answers is pleased to announce the availability of a new service called "Selective Marketing through Printed Statements." This service allows you to target your marketing messages to members who do not receive printed statements.

- Select a group of members who do not receive printed statements.
- Select a list of all your items (CU*BASE to members).
- CU*Answers will print and mail these items to members.

Selective Marketing through Printed Statements is available to members who do not receive printed statements.