

# Market to Your Members—Directly to Their Printed Statement!

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

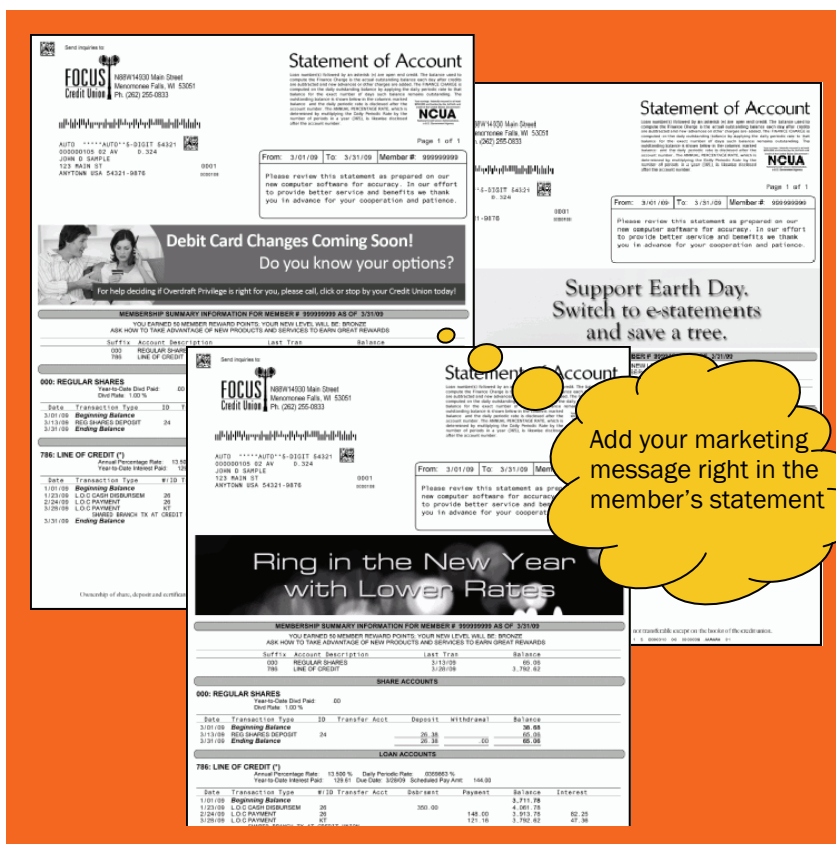
Tired of members just throwing away your marketing materials when they receive their statement? Want a way to ensure they get your message?

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.



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://www.marketing.cuanswers.com>.

Not finding what you want here? Web Services has graphical artists on staff who can make custom onserts for you! For an hourly fee, contact the Web Services Team at [web\\_services@wesconet.com](mailto:web_services@wesconet.com).

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

Description of Insert	Leflover Pieces	All or Selective	Count	Name
Paper Inserts				
1 COURTESY REPLY ENVELOPE	H = Hold at Printer	S = Selective	4,375	STMT01
2 SAVE TO WIN FLYER	R = Return to CU	A = ALL		STMT02
3	N/A	N/A		STMT03
4	N/A	N/A		STMT04
5	N/A	N/A		STMT05
Selective Onsert				
6 SELECTIVE INSERT	N/A	S = Selective	24,375	STMT06

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 via Printed Statements" booklet found under "S" on the CU\*BASE Reference Page:  
[http://www.cuanswers.com/client\\_reference.php#S](http://www.cuanswers.com/client_reference.php#S)

### Step 3: (Selective Statement Inserts Only) Name the Selective Insert in CU\*BASE

Another step needed only for *selective* statement inserts is to name the selective statement insert 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 the Member

Communication Menu (MNPRTC) #11—Update Statement Messages/Inserts. On this screen simply name the selective statement insert 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 inserts, you will need to work directly with your Statement Print Vendor for the administration and printing of the insert. You will need to upload the insert 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 insert graphics.

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

The screenshot displays the 'CU\*Answers CU's Statement Processing Onsert Administration' interface. It features a sidebar on the left with navigation options: History (+ 2010), Upload Onsert (July, August, September, October), FAQ, My Profile, and Logout. The main content area is titled 'CU\*Answers CU's Statement Processing Onsert Administration' and includes a status message 'Your changes have been made' with 'Approve / Finalize' and 'View Proof' buttons. The interface is divided into two sections: 'DEFAULT ONSET' and 'SELECTIVE ONSETS'. The 'DEFAULT ONSET' section contains a table with columns for Statement Cycle, Required Onsert Size, and Onsert / Description. A row for 'JUL 2010' shows a required size of '(8.00" x 1.50")' and a description of 'New Years' with a preview of a graphic titled 'Ring in the New Year with Lower Rates'. The 'SELECTIVE ONSETS' section contains a similar table with columns for Statement Cycle, Selective Onsert Number, Required Onsert Size, and Onsert / Description. A row for 'JUL 2010' shows a selective onsert number of '1', a required size of '(8.00" x 1.50")', and a description of 'skiing\_onsert.pdf' with a preview of a graphic titled 'What will you spend your savings on?'. The footer of the interface includes copyright information: '© 2009 Sage Direct, Inc All Rights Reserved 3400 RALEIGH AVE SE GRAND RAPIDS, MI 49512 616.940.8311 1.800.729.8310'.

Note how the top section allows for the upload of a default onset 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.

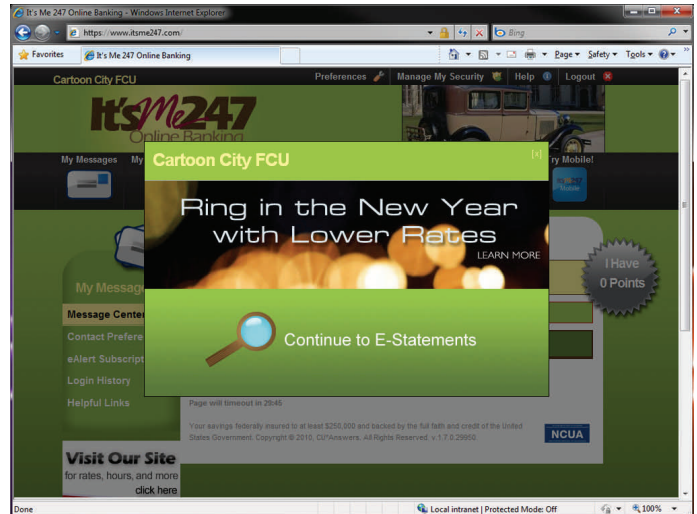
## What About My E-Statements?

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

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 e-Statements, or provides a jump page allowing them to select to view it.

Interested in this service? Contact Xtend at [info@xtendcu.com](mailto: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

#### Selective Marketing through Printed Statements

##### INTRODUCTION

Cartoon City FCU is introducing a new way to send your direct mail marketing mailings. We are introducing our members the ability to opt-in to receive our direct mail marketing mailings through our website. This is a new way to reach our members and provide them with the information they need to make the most of their relationship with us.

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