

## Greater Alliance Federal Credit Union

### Converting Uncertainty into Opportunity

**Sector:** Financial services

**Elements:** Direct mail, lobby posters, newsletters, online landing page, Facebook ads, on-hold messaging, staff support materials

With a major conversion of its core processing and remote banking systems only months away, Greater Alliance FCU came to Creative Co-op with a challenge. How could the credit union prepare members for a three-day outage while the new systems came online, without losing accounts or suffering a PR crisis?

Creative Co-op proposed a four-phase campaign based on three key principles:

- Position the conversion positively as an upgrade, without “core conversion” or computer jargon that could worry less tech-savvy members
- Integrate familiar, reassuring elements of the Greater Alliance brand and its “A Greater Way to Bank” tagline
- Leverage the credit union’s trusted staff, providing support materials and talking points with ample time to allay fears in 1-to-1 conversations

“The number of positive comments about our new remote banking services has been very encouraging and rewarding.”

– Glenn Guinto, President and CEO

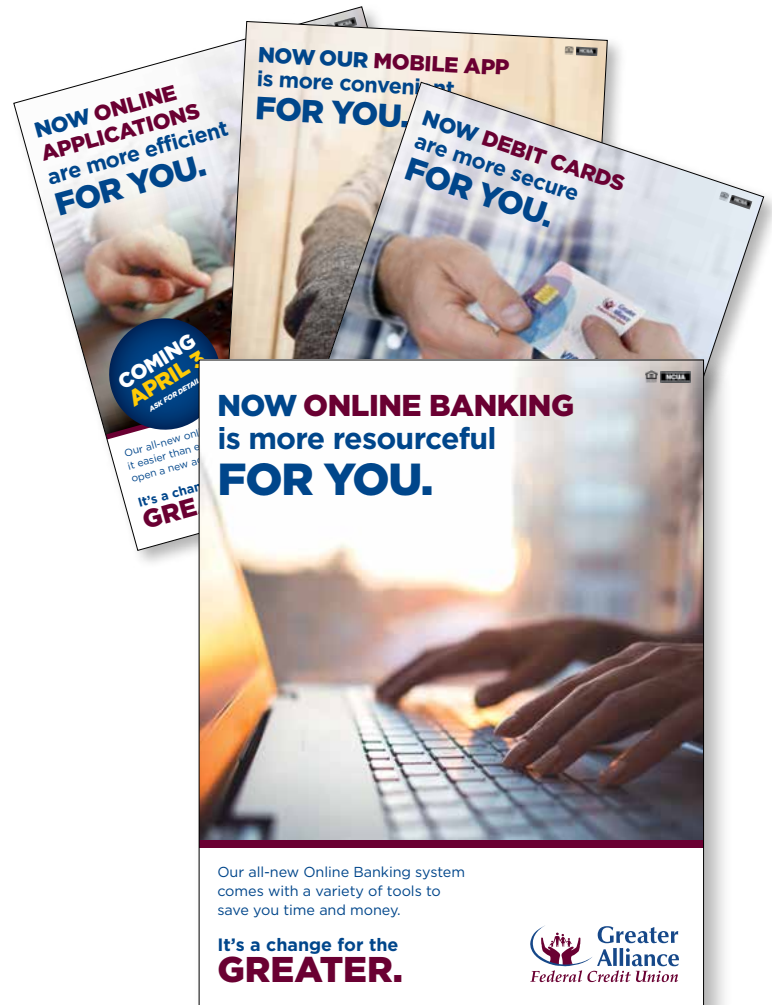
#### THE CREATIVE APPROACH

Taking advantage of the helping hands in Greater Alliance’s logo, each concept showed a closeup of hands accessing a new credit union feature, next to a direct headline announcing the benefit “for you.” This simple approach aroused anticipation of new perks, instead of anxiety about a system changeover.

Tone is critical in outage communications, and Greater Alliance’s campaign was designed to affirm rather than alarm. It emphasized that the upcoming changes would meet evolving member needs well into the future, using a theme based on Greater Alliance’s tagline: “It’s a Change for the GREATER.”



Buttons worn by staff members stimulated conversation in branches.



Lobby posters repositioned the core conversion as a member upgrade for personal convenience.

To learn more about Creative Co-op and our approach to creating distinctive and powerful brand communications for your business, call 603.658.1600.



## A TACTICAL FUNNEL

Creative Co-op's four-month campaign helped members get comfortable with the upgrade, gradually narrowing the focus from basic awareness to pre-planning tips and conversion procedures as "Upgrade Weekend" drew near.

- **120 days out:** broadcast tactics such as CEO letters, statement inserts, monthly newsletters, website FAQs and lobby posters began announcing the upgrade and its general benefits, while teasing future updates.



Postcards alerted members to key dates and help resources.



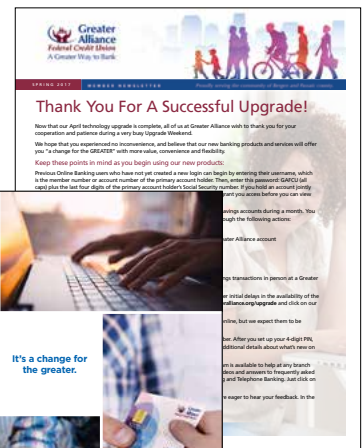
Social media conveyed member benefits and commitment to service.



- **60 days out:** detailed social media posts, postcards and web ads alerted members to critical dates, while driving them to branch and call center staff equipped with key talking points. At the same time, detailed materials on upgraded services were regularly archived to a dedicated landing page.
- **Final month:** email blasts, social media posts and on-hold phone messages provided quick-response messaging to help members cope with conversion issues, backed by quick reference cards and designated "Upgrade Team" reps who provided a reassuring back-channel in case of emergencies.
- **Post-conversion:** thanking account holders and providing follow-up is critical in shaping member impressions, so a direct mail letter and newsletter recap by Greater Alliance President and CEO Glenn Guinto were among several tactics used to update members and recognize the work of staffers.

## RESULTS

Organizational change can pose uncertainties for firms and customers alike, risking criticism and damaged relationships. But Greater Alliance's proactive approach prepared members for a smooth conversion, with zero negative reviews on social media despite that being the only available outlet during the credit union's three-day shutdown. Today Greater Alliance has the 21<sup>st</sup> century delivery channels it needs to serve a diverse membership, while maintaining the same trusted relationships that have defined it for 80 years.



Newsletters and website FAQs provided regular updates, while the campaign theme was incorporated into Greater Alliance's annual report.