

This community-chartered credit union partnered with Kasasa in August 2017. Their goal was to increase new account growth, retention, and account holder engagement. After seeing success with a more hands-on, multi-channel approach, they were eager to boost their marketing performance and minimize their workload with Kasasa's Optimized, Results-Based (ORB) marketing program.

With a limited in-house marketing team, they loved the hands-off approach offered by ORB marketing. It enabled them to maximize their return on marketing investment with a multi-channel, data-driven program — requiring virtually no new work for their team. Investing \$30K per year in ORB marketing, they used an always-on program and predictive modeling to deliver the right message, at the right time, to the right audience. Real-time reporting provided attributable performance results that they could confidently communicate to their CEO. Meanwhile, continual optimization de-risked their marketing investment, ensuring their performance got better and better with time. After just four months, they were blown away by their results.

“In a small marketing department, team members have to wear many hats. The ORB marketing program took a huge workload off this credit union’s team and allowed them to focus on other initiatives. And the ability to attribute results back to the marketing gave them credibility within their organization.”

— Keith Brannan, Kasasa Chief Marketing Officer

Results directly attributed to ORB marketing in first ten months:

\$2.5MM

gained in core deposits

4,300%

return on marketing investment

468

new accounts acquired