

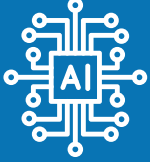
POLE POSITION

Building a
brand that
leads the pack



Making moves

Credit union marketing trends of note



Leverage Artificial Intelligence (AI)

- Use AI to personalize user experiences and interpret data.
- Implement AI-powered chatbots for improved customer service.
- Free up staff time by automating routine processes.



Create Short, Engaging Videos

- Post quick, informative videos on Facebook Reels, YouTube Shorts, and TikTok.
- Highlight credit union services in a digestible format.
- Partner with influencers or local celebrities for added reach.



Make the Consumer the Hero

- Focus marketing messages on how members solve problems with your help.
- Showcase real-life benefits instead of just listing features.
- Use storytelling techniques to make financial services relatable.



Emphasize Corporate Responsibility

- Highlight involvement in local charities and social causes.
- Show support for issues younger generations care about (i.e., climate change & equity).
- Share community-driven initiatives on social media.



Optimize for Conversational Search

- Adapt website content for voice search queries.
- Use natural, longer search phrases (e.g., "credit unions within 15 minutes of XYZ").
- Improve SEO rankings by focusing on how users naturally ask questions.



Implement Digital Document Signing

- Offer e-signature options to enhance member convenience.
- Reduce the need for in-person visits for simple transactions.
- Improve efficiency while freeing staff to focus on customer service.

The Relentless Commitment to Knowing Your Market

There is no shortage in new marketing tactics these days. However, with every every technological shift, one truth remains unchanged: the most successful financial marketers are the ones who know their audience intimately. Not just on a surface level—not through algorithms, data points, or fleeting social interactions—but through genuine, relentless engagement.

Business today clearly demands more than just digital touchpoints. At NextPage, we believe that good business still requires connecting with clients where they are, and to proving—time and time again—that they are valued. This cannot be about chasing the latest trends; it has to be about building trust through authentic interactions.

Consider this: when was the last time a digital ad left a lasting impact on you? Now, contrast that with the tangible power of a well-crafted print piece—something that lingers on a desk, sparks curiosity, and creates a moment of reflection. Traditional media, particularly print, offers a rare opportunity to break through the noise and demonstrate an unwavering commitment to customers in a way that feels personal and intentional.

But the medium alone isn't enough. Marketers, maybe more than ever before, should lean into the human side of financial services. It is our objective—understanding not just what their customers need, but how they feel, what they worry about, and what truly matters to them. This is where financial brands distinguish themselves: through a relentless pursuit of market intimacy.

That commitment requires effort. It means spending time in the communities you serve, listening more than you speak, and crafting messaging that resonates beyond a fleeting impression. It means delivering content that educates, inspires, and builds confidence—whether that's through personalized mailings, exclusive events, or print pieces that reinforce a brand's dependability.



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The financial industry has always been built on trust, and trust is not a one-time transaction. It is earned, reinforced, and nurtured over time. The financial marketers who will win in 2025 and beyond will be those who refuse to cut corners in their customer relationships. They will be the ones who recognize that technology enhances engagement, but it does not replace it.

In a world of fleeting connections, be the brand that stays. Be the brand that commits. Because true market intimacy isn't just about reaching your audience—it's about proving you belong in their world.



Warmest regards,
Gina Danner
CEO
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About Elevate

Elevate Magazine, sponsored by NextPage (<https://gonextpage.com>) is a premier content platform designed for marketing personnel within financial institutions. The magazine, featuring informative and thought-provoking content, aims to highlight common challenges across financial marketing, trend-worthy items, and innovative campaign management tactics. As a thought leader in tactical marketing for the financial industry, NextPage provides invaluable insights through interviews and distribution of content, making Elevate a great source of education and inspiration for C-suite marketing executives. With a focus on community building and creating new marketing ideas, Elevate Magazine and NextPage are at the forefront of driving success in financial marketing.



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Building a brand
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Print. TV and radio. Outdoor signage. Digital and sponsorship partnerships. When it comes to keeping its name in front of members and prospective members, Blaze Credit Union exercises a strategic and comprehensive evergreen branding and marketing approach. Lisa Lehman, VP Marketing & Communications, says the engagements help reinforce its commitment to the communities it serves.

With 28 branch locations and 250,000 members, Blaze is Minnesota's third-largest credit union. In 2024, after a merger between Hiway Credit Union and Spire Credit Union, the rebranded Blaze Credit Union was born. As part of the post-merger marketing strategy, Blaze created the "I'm on Team Blaze" campaign, which featured commercials with ambassadors from both credit unions. This included a number of high profile Minnesota athletes extolling the value of being Team Blaze to the masses. Athletes included U.S. World Team skater Greta Myers; Minnesota Wild defenseman Brock Faber; Minnesota Twins Hall of Famer Tony Oliva; among others.

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We are able to customize experiences for our members based on their products and preferences, but also marketing in ways to get in front of different audiences.”

— Lisa Lehman, VP Marketing & Communications, Blaze Credit Union



"Consistency helps build trust and deliver on our brand promise," Lehman says. "When a member or potential member sees or hears one of our Blaze spots, the message, the voice and the logos are easily identifiable, and are immediately associated with our brand. By using consistent messages and familiar faces, staying aligned is simplified. It shows we're a financial institution that isn't going away, but one that values the same communities that our members live in."

In today's fiercely competitive financial landscape, building a brand that not only fosters long-term financial success, but also resonates deeply within the communities you serve is more crucial than ever. Lehman says financial institutions must continually evolve with consumer expectations—a challenge that often comes down to a simple "adapt or die" reality. Successfully navigating this shift means embracing new ways of communication in the digital age.

"Not only do members do their banking differently, they also want to receive communication differently," Lehman says. "That is where the use of digital marketing has been key for us. We are able to customize experiences for our members based on their products and preferences, but also marketing in ways to get in front of different audiences. In the end, everything has to work together—same messages delivered across a variety of channels."

Hands on the wheel

As a marketer who spends his days helping clients sharpen their branding acumen, Scott Drucker knows the value in not only creating brand value propositions, but also go-to market strategies. The Managing Partner with the Drucker Group says that for today's financial institutions, the strategy starts with a crystal-clear identity and purpose.

In a crowded market like the Chicago metro area, where more than 150

banks compete daily for market share, standing out can be daunting. Drucker says the successful ones define who they are, why they exist and what uniquely sets them apart. This clarity can help align messaging with values and needs that matter most to their customers.

At the heart of this is a customer-centric approach. "In financial services, the product isn't just money or accounts; it's the people and relationships behind them. Positioning wealth advisors, commercial officers and retail bankers as trusted partners fosters deep, long-term loyalty. Pairing this with a reputation for expertise and credibility—reinforced with proactive communications and thought leadership—further solidifies a brand's authority."

Too often, Drucker says financial brand marketing falls into a predictable rut with messages about lower fees, "We listen" or "We put you first" messaging

that all starts to sound like echoes in a hallway. To break through, you need a bold, unique visual identity and messaging strategy like distinctive design elements, a signature photography style or a brand voice that reflects core values.

“You need something that feels authentic and alive. But differentiation goes beyond aesthetics; it’s about strategic positioning,” Drucker says. “Consistency is the backbone of a powerful brand position. You can’t just claim to be client-focused; you must prove it through every interaction. Website. Apps. Face-to-face meetings. When branding, messaging and customer experience align seamlessly across all channels, it builds trust and reinforces your brand’s identity in a way that sticks with people.” In the end, achieving this requires more

banks, where a unified team effort drives consistency and better results. Financial marketers can ensure alignment by investing in regular training, clear identity guidelines, and ongoing feedback loops to keep every touchpoint on the same page.”

By aligning your brand’s authentic strengths with genuine client needs, you not only create a temporary advantage, but a resilient market position that your competitors find difficult to replicate and clients find impossible to replace. **E**

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— **Scott Drucker, Managing Partner, Drucker Group**

than just good design; it also demands sales and marketing teamwork and training. Drucker says when every employee, from tellers to executives, understands and lives the brand message, the customer experience becomes cohesive and reliable. “We’ve seen this in action with top-performing



STORYBOARD

“Buy a House, Get a Puppy.” For a limited time, if you financed your home with United Heritage Credit Union, you not only received \$300 cash back, but also had a \$300 donation made to Austin Pets Alive (APA) in your name. In addition, any leftover amount would be given to APA.

Best practices for financial storytelling

Kevin Farley says the program helped connect home financing with something unexpected, in this case, helping shelter animals find homes. The storytelling made financial decisions feel more personal, creating an emotional connection between the Austin, Texas, credit union and its members. “The campaign highlighted the excitement of homeownership while reinforcing our commitment to the community,” says Farley, VP of Experience and Engagement.

In today’s ever-competitive and continually shifting financial landscape, storytelling meets people where they are—on their phones, in their feeds, etc. Farley says making real-time customer engagements helps bridge the gap between what can sometimes be complex concepts. “People see through exaggerated claims or overly polished marketing. The most

effective storytelling blends emotion with transparency. Real stories, backed by concrete data, build credibility. If a campaign highlights a success, pairing it with insights on how others can achieve similar results adds value.”

The other side is making sure you are upfront about risks, trade-offs and realistic timeframes. Because financial topics can be intimidating, a well-crafted story helps bring them to life in a way that resonates with people. “When people see themselves in a narrative, they are more likely to engage and understand how financial products apply to their own situations,” Farley says. “Instead of talking about rates, fees or industry jargon, stories illustrate the real-world impact. Whether it’s the peace of mind that comes with saving for a home or the sense of accomplishment in paying off a loan, the story makes a true connection.”

Trust comes from demonstrating expertise while keeping the focus on your customer's journey rather than pushing products. United Heritage leans on mediums like digital content, which are visually driven and easy to consume. Testimonials, interactive social posts, short-form videos and print all are powerful tools for breaking down complex topics in seconds. User-generated content creates credibility.

"When people share their own financial wins, it reinforces trust," Farley says. "Above all, consistency across channels is key. A strong brand voice, adapted for different platforms, ensures that every touchpoint reinforces the larger story being told."

Creating your narrative

A compelling financial story needs three core elements: a clear challenge, a relatable character and a tangible outcome. The best stories start with a real-world problem. Maybe it is a young professional struggling to budget, a family navigating the home-buying process or a retiree looking for financial security. Your character should reflect your audience's own experiences, making the story feel personal.

While financial institutions serve a diverse range of clients with varying backgrounds and situations, Caresse Vera says each share a common goal when it comes to finances. By sharing how these outcomes can be meaningful and successful, you transcend generic messaging.

"A compelling financial story has a relatable character, someone who faced financial struggles or aspirations that others can connect with," says Vera, Creative Director, Lumena Financial Strategies in San Diego. "It also includes a clear conflict, such as saving for retirement or overcoming debt, which makes the story engaging. A strong resolution where the character finds a solution through smart financial planning shows how their actions led to positive change, which also demonstrates the value of the advisor's guidance."



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— Caresse Vera, Creative Director, Lumena Financial Strategies

By making each prospect feel this connection through shared challenges and achievable outcomes, financial brands can help them see the value in what they offer and how it aligns with their needs. You can strike the right balance between emotional storytelling and factual accuracy by combining their narratives with data-driven tools like financial calculators and "what if" scenario tools like the software Holistiplan.

"While storytelling engages emotions and makes financial topics digestible and relatable, these additional tools can help provide personalized data that reinforces the story and ensures clients understand the more realistic outcomes for their unique situation," Vera says. "This combination allows you to connect with each client on an individual level, building trust and credibility by presenting data and reports that back up the story and provide transparency into the decision-making process."

Through its Financial Literacy Hub, Lumena Financial Strategies offers a platform for its customers to view programs and success stories from other people. Thanks to a series of monthly webinars, the firm is helping connect stories with solutions. "The hub provides a collection of resources for people of all ages to learn financial concepts," Vera says. "It helps bridge the gap between our clients and their families, especially younger generations, to combat generational wealth transfers that occur when advisors fail to genuinely connect with clients' children or beneficiaries. We use it in many campaigns and combine this resource with other tools when storytelling."

In the complex world of financial services, storytelling isn't just a marketing tactic; it's a powerful bridge connecting institutional expertise with human experience, transforming cold data and abstract strategies into compelling narratives that resonate, inspire trust and, ultimately, drive meaningful engagement. **E**

Stats that deliver

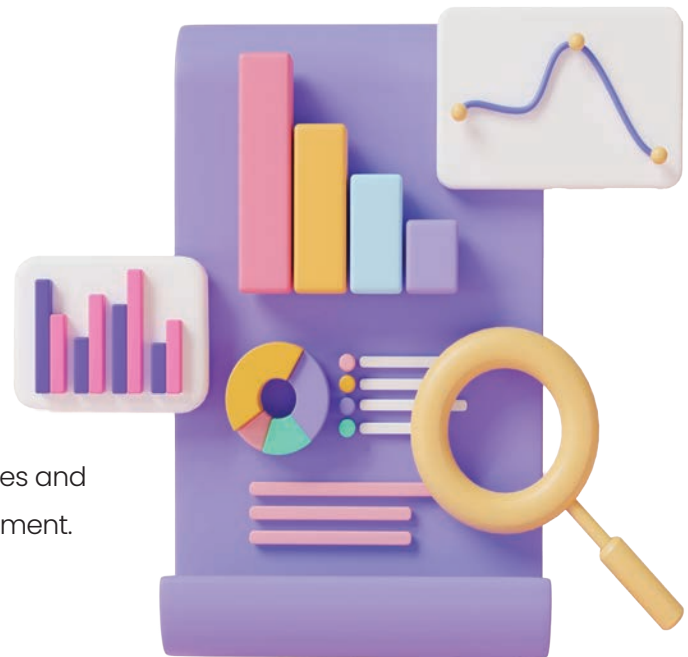
Financial marketers drive engagement

Marketing budgets

Financial services marketing budgets have seen slight decline, falling from 7.5% in 2023 to 7.0% in 2024.

This indicates a need for marketers to optimize resources and focus on strategies that deliver higher returns on investment.

Source: Gartner



Customer acquisition focus

Approximately 40% of financial institutions identify new customer acquisition as their primary opportunity in the coming year, underscoring the competitive nature of the industry. *Source: The Financial Brand*

On the line

Consumer's search behavior

A significant majority of financial services consumers begin their journey with an online search. This underscores the importance of a strong online presence for financial service providers.



90% for loans and mortgages

85% for check cashing services

76% for tax return preparation services

Going mobile

Over the past two years, mobile searches related to financial planning and management have grown by 70%. Additionally, mobile queries for "what should I invest in?" have increased by 65% year-over-year, highlighting the growing reliance on mobile devices for financial information.

Source: Invoca.com



Omnichannel experiences drive sales

24%

of consumers say a seamless digital experience (across websites, apps, etc.) is more important than price when making a purchase decision.

54%

from email marketing

44%

from social media ads

22%

from mobile app alerts

43%

from social media posts

26%

from SMS/MMS messages

Unlock the Hidden Potential of

New Movers

Reach consumers with results-driven, timely omnichannel campaigns, combining direct mail and digital to introduce your brand to new residents. **Don't miss this opportunity** to take the first step toward effectively targeting a profitable audience today.

**Secure exclusive zip code access
before your competitors!**

SCAN TODAY TO GET STARTED!

