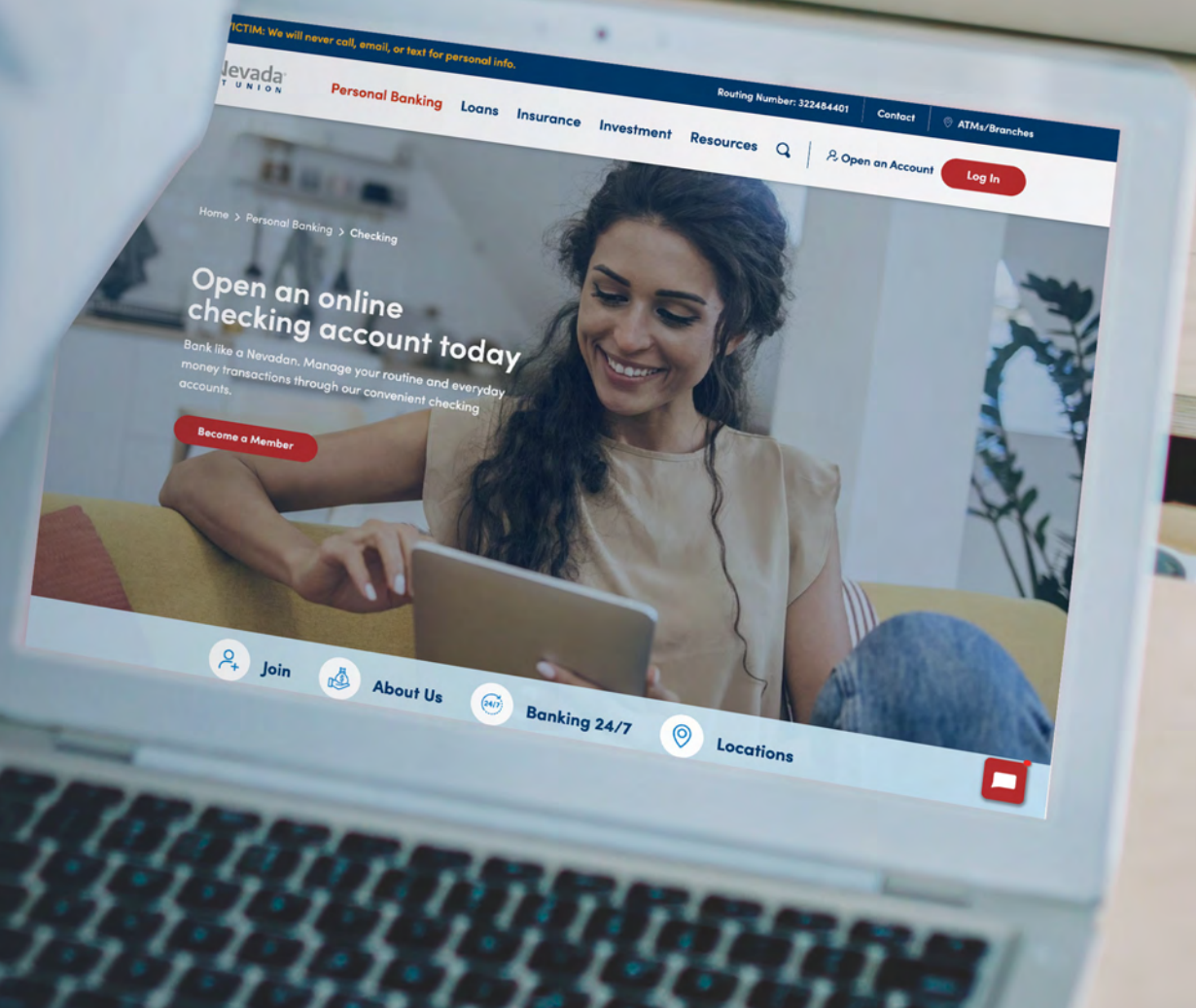
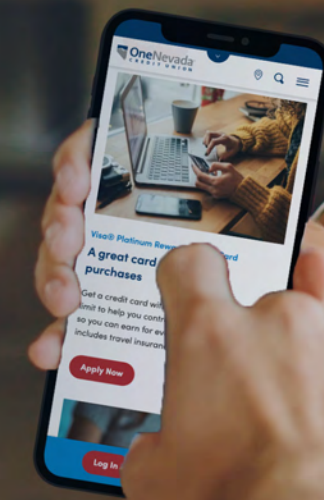


Milestone

Be everywhere your  
customers are

# How to Convert Your Bank, Credit Union, or Financial Services Website into a Member Acquisition Channel



In this ebook, we'll delve into the crucial aspects of transforming your credit union website into a powerful tool for member acquisition. From understanding the latest trends impacting digital marketing for credit unions to selecting the right platform and exploring real-world case studies, we'll equip you with the knowledge and insights needed to thrive in today's competitive landscape.



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- 1 Trends Impacting Credit Union Digital Member Acquisition and Marketing**
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- 3 Case Study: Milestone CMS Platform Drives One Nevada Credit Union's 20% Loan Growth**



1

# Trends Impacting Credit Union Digital Member Acquisition and Marketing

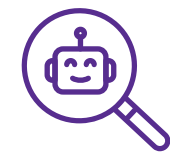
In this section, we'll explore the dynamic landscape of digital marketing for credit unions. From shifting consumer behaviors to the expectations of CEOs and CFOs, we'll dissect the trends shaping online presence for financial institutions. Understanding these trends is essential for adapting your strategies and meeting the evolving needs of your members in the digital age.



**Consumer Behavior**



**Digital Member and Customer Acquisition**



**Evolution into AI-Driven Google Search Generative Experience**



**Personalized User Experiences**



**Efficiency in Operations with Artificial Intelligence**

 Consumer Behavior

## Credit Union members are increasingly seeking a shopping-like experience from their credit union website

Unlike traditional visits to physical branches or phone inquiries, members now desire a seamless ecommerce-like experience whether they interact in person or digitally. This shift in consumer behavior underscores the importance of delivering intuitive and user-friendly digital experiences that cater to members' preferences for convenience and efficiency. As expectations evolve, credit unions must prioritize website optimization and user experience enhancements to meet the demand for frictionless interactions across all touchpoints.





### Digital Member and Customer Acquisition

In response to the changing landscape of financial services, credit union management are placing greater emphasis on the adoption of digital models and leveraging websites for member acquisition.

With the rising cost of member acquisition and intensifying competition from fintech companies, banks, and apps, there is heightened pressure on financial institutions to maximize the effectiveness of their online presence. This entails not only investing in robust digital marketing strategies but also optimizing website functionality and content to attract and retain members in a highly competitive marketplace.

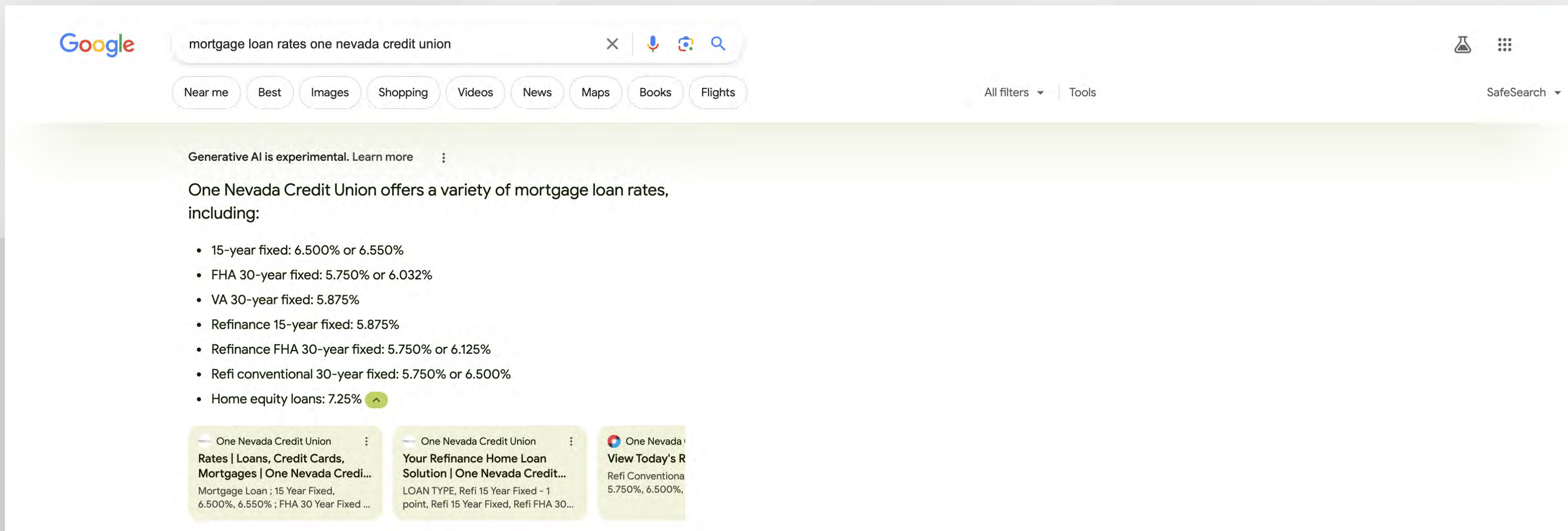




### Evolution into AI-Driven Google Search Generative Experience

The search landscape is undergoing a dynamic shift with the integration of AI into search engines like Google and Bing.

This evolution, particularly the emergence of the "Search Generative Experience" (SGE), signifies a new kind of user experience and interface. As credit union marketers, it's crucial to adapt SEO and content strategies to effectively engage users within this evolving search ecosystem. Understanding how AI influences search results and personalizes information delivery will be key to crafting targeted content and optimizing outreach efforts in the face of this exciting new frontier.



 **Personalized User Experiences**

The digital experience has undergone significant evolution, particularly with the preferences of millennials and Gen Z consumers.

These digital-native demographics demand an "always-on" experience akin to that of mobile apps, where information is readily accessible and seamlessly integrated into their digital journeys. Credit unions are increasingly called upon to deliver personalized experiences across the entire member journey, from top-of-funnel content discovery to mid-funnel consideration stages and bottom-funnel transactional interactions. Meeting these expectations requires a holistic approach to content optimization, user engagement, and journey mapping to ensure relevance and effectiveness at every stage of the member lifecycle.







2

## How To Select a Platform for Credit Union Digital Member Acquisition and Marketing

Selecting an ideal content management platform for your credit union or bank website can be a challenging task. As you select the platform, not only do you have to take into account the key objectives of your organization, but you also have to ensure that the platform you choose will stay current with the latest digital trends and spring your organization ahead of your competition. The ideal content management platform for banks and credit union not only shares content with the world, but also facilitates customer acquisition and personal digital experiences in line with the best-in-class retail and consumer-facing sites such as Amazon, etc.

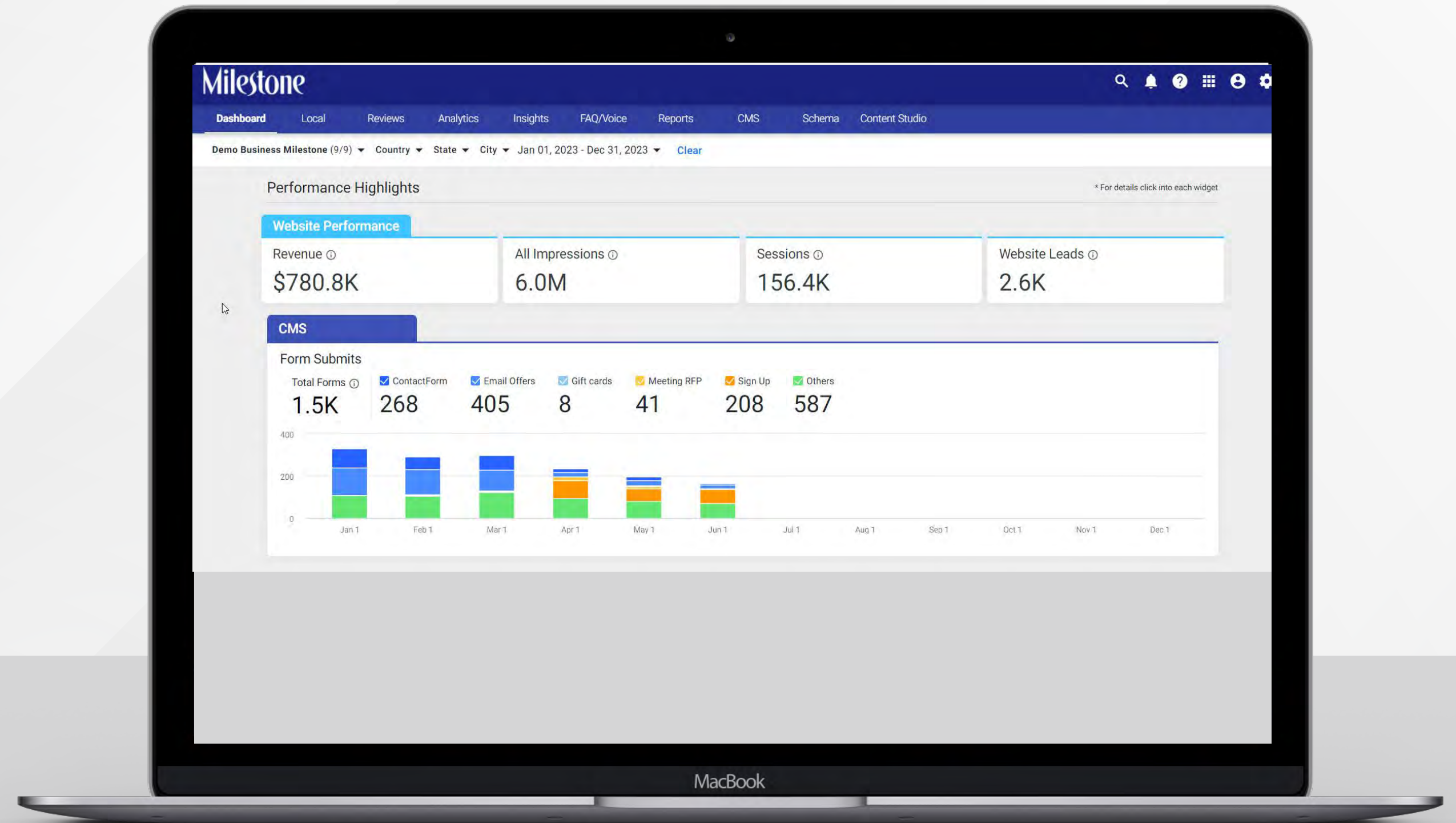


In the following sections we explore each of the categories and the features of platforms that are a must-have for your next generation digital presence.

1. Enterprise-class platform
2. Creative Design
3. Content
4. Images and Media
5. Customer Acquisition (SEO-First)
6. Interactive Conversion Tools
7. Personalized Experiences
8. Location Pages
9. Compliance
10. Hosting and Security Infrastructure
11. Total cost of ownership

# Enterprise-class Platform

Selecting an enterprise class content management and marketing platform will enable scale and ensure that your marketing stack is robust and capable of acquisition, retention, and deepening.



## SOME KEY FEATURES OF THE PLATFORMS INCLUDE:

**Hybrid-headless content management systems** are user-friendly, easier to manage, while offering the data distribution and integration capabilities of a Headless CMS platform. Leverage a hybrid-headless CMS for seamless content delivery across all devices.

## Content management for non-technical teams.

Small-to-mid sized banking institutions cannot afford technical engineers to manage the website. Make sure that the CMS you select is easily managed by non-technical and administrative staff at your organization.

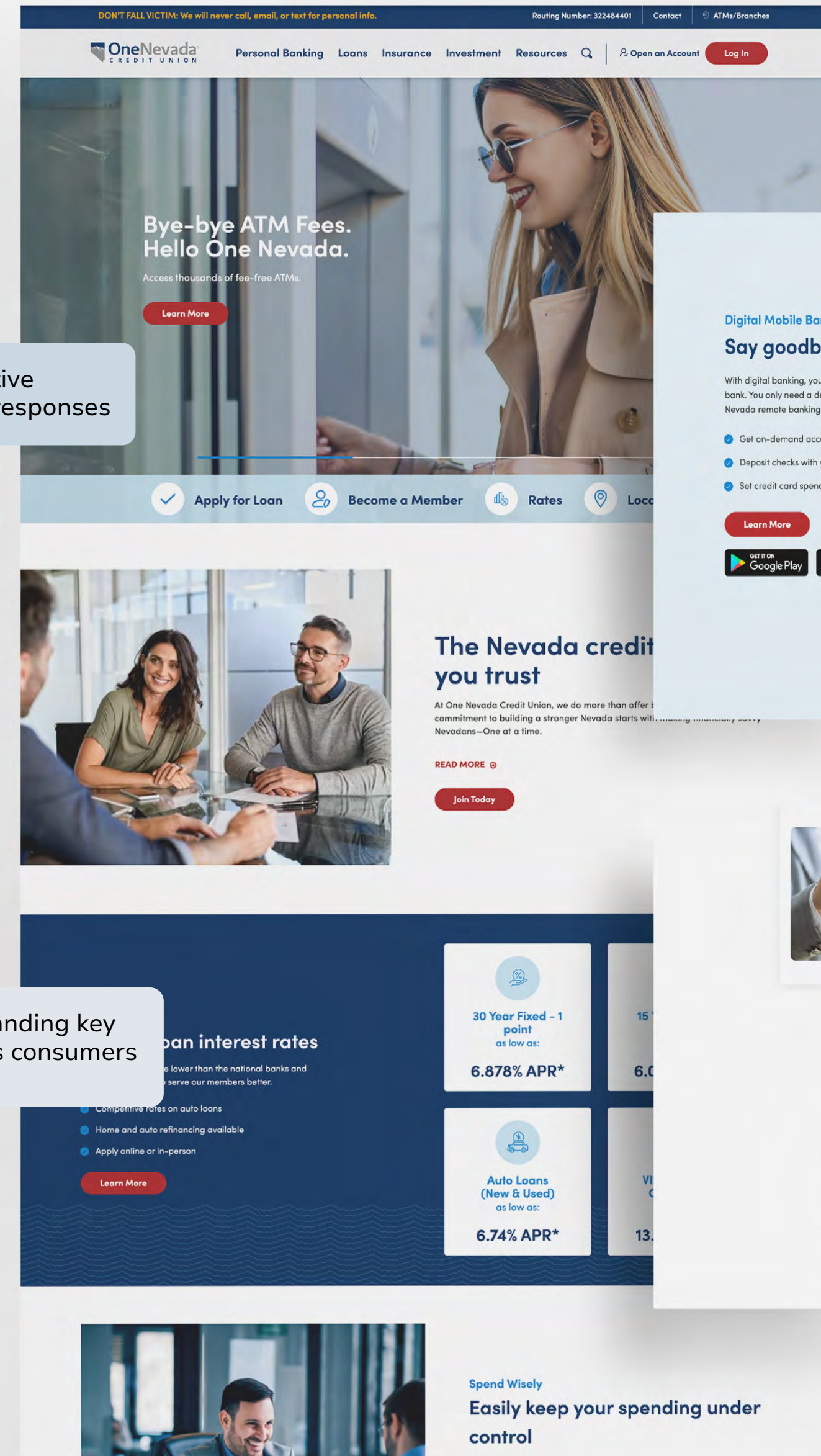
**A reporting dashboard** to monitor the performance of your website on an ongoing basis.

# Gorgeous Creative Design

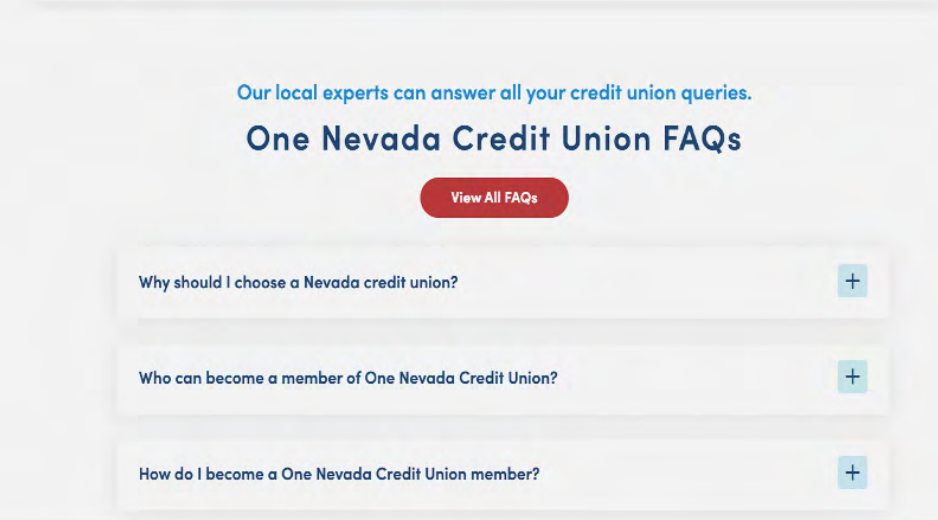
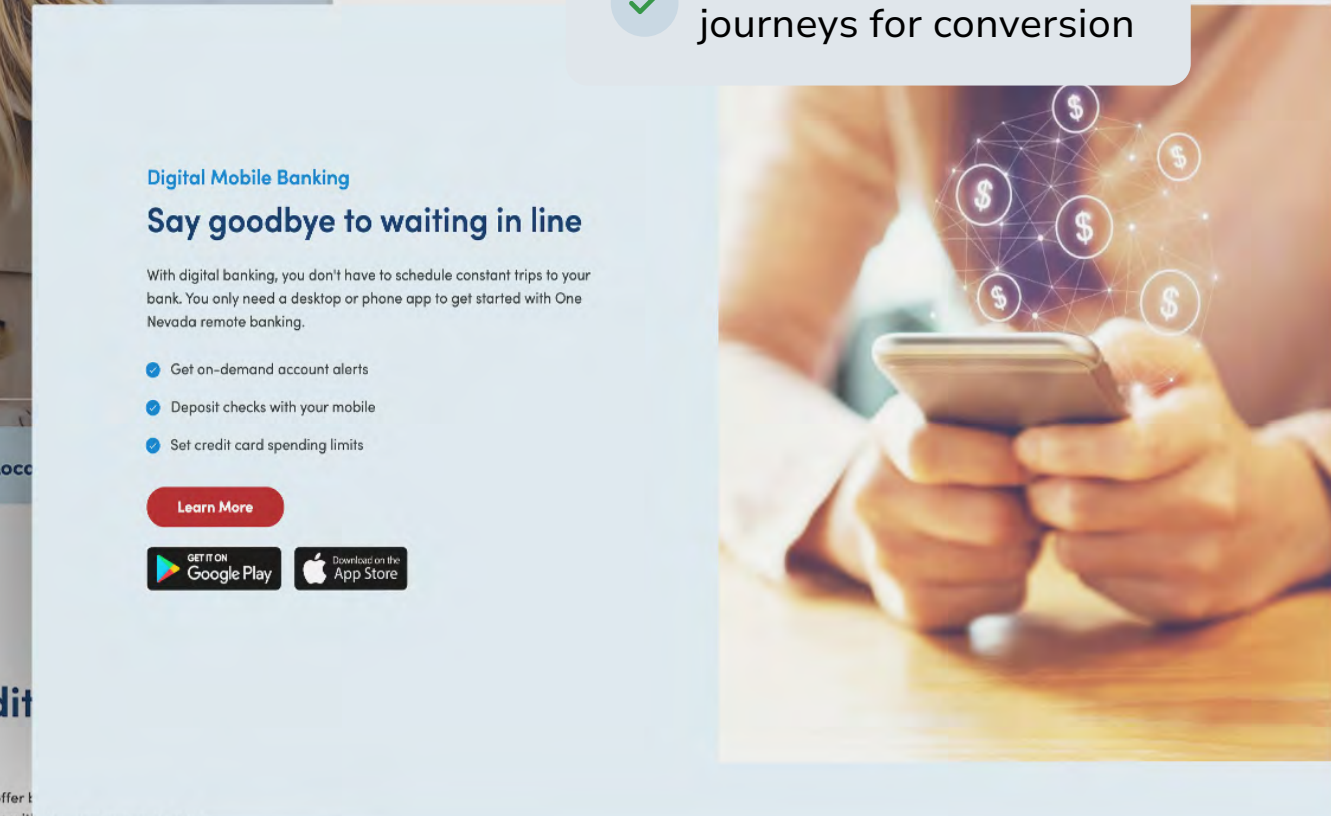
Consumers now anticipate website experiences from banks that are similar to consumer facing e-commerce platforms such as Amazon, travel sites, etc. This puts extra onus on the banks to have gorgeous designs that can connect emotionally with the customers, while still tailored to their needs and customer journey. Previously, creative design wasn't paramount, but now, visually appealing sites optimized for digital experiences are highly sought after. Creative design encompasses not only stunning visuals but also optimization for conversion and understanding consumer-driven elements for impactful design decisions.

✓ Evoke positive emotional responses

✓ Understanding key elements consumers react to



✓ Optimized customer journeys for conversion



## Generative AI Content Platform

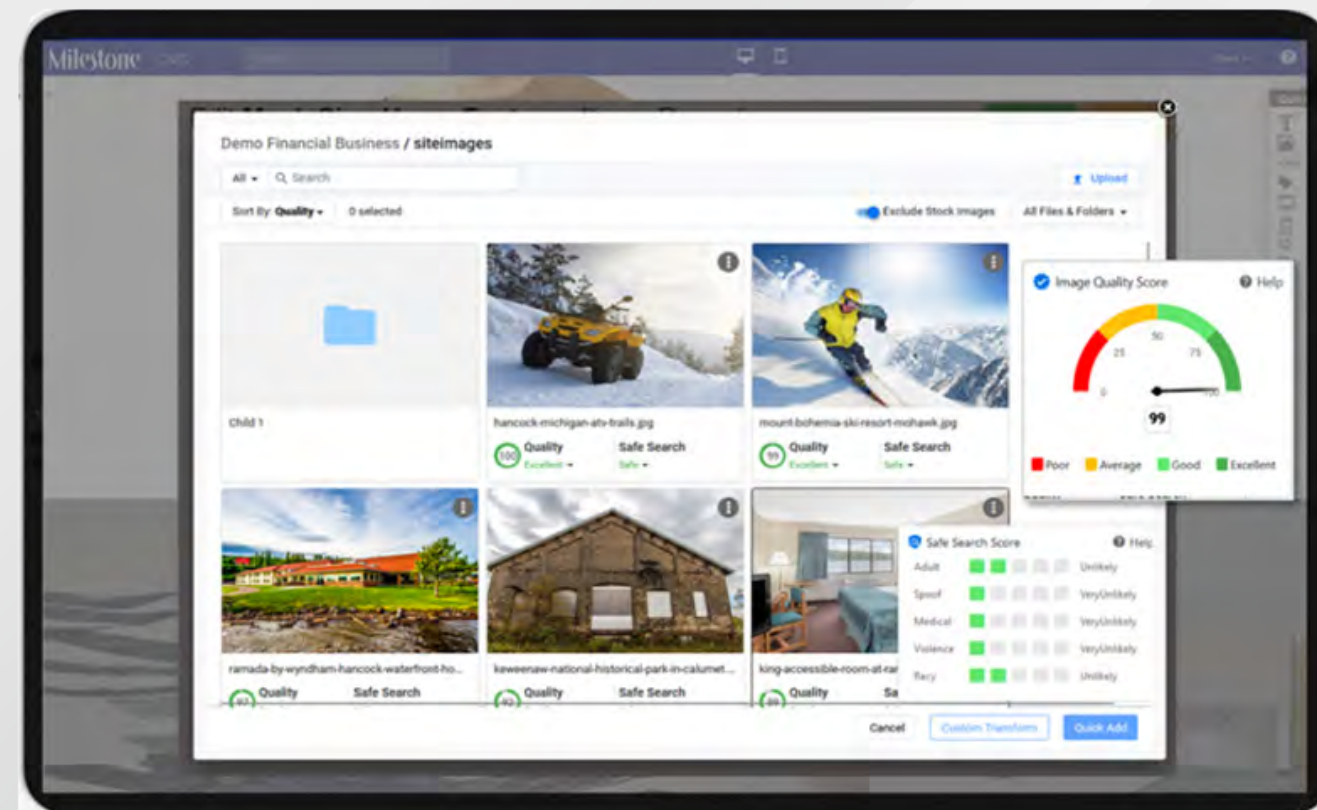
As we discussed in the key trends impacting banking industry, content is at the center of the next generation digital marketing. Consumers (and consequently search engines) are seeking content that is helpful, information, and helps them make their decisions faster. Your next generation CMS should have tools and functionality to enable generative AI content creation ability and should enable you to generate content that's optimized for SEO. This will enable content ideation and creation at scale.

The screenshot shows a banking website with a dark blue navigation bar containing links for Bank, Mortgage, Wealth, Insurance, Investments, About Us, Careers, and Investor Relations. On the right of the navigation bar are links for 'Call Us: 757.728.1200', 'Contact Us', and 'Locations'. Below the navigation bar are three buttons: 'Pay Your Loan', 'Schedule an Appointment', and 'ONLINE BANKING'. The main content area features a large heading 'Customized Solutions From A Private Banker' with a green underline. Below the heading is the sub-heading 'Redefine your financial expectations'. To the left of this sub-heading is a callout box with a green checkmark and the text 'Provide content ideas'. To the right is another callout box with a green checkmark and the text 'Content creation, SEO, publishing'. Below the sub-heading is a photograph of a smiling man with glasses and a beard, wearing a light blue blazer over a dark shirt, with his arms crossed. To the right of the photograph is a bold headline: 'Your financial life can be complicated, Old Point's Private Bankers help make sense of it all.' Below the headline is a paragraph of text: 'As a business professional, your priority is growing your business, and the careful management of your financial cycle plays a big part in your success. Having to rely on an assortment of accountants, attorneys and financial advisors can become a time-consuming struggle.' At the bottom right of the page is a third callout box with a green checkmark and the text 'Helpful content tools for FAQs, Events, etc.'

## Managing Images and Media

A well optimized financial services website leverage by centralizing digital asset management across all locations, reducing inefficiencies and redundant images. Convert images into entities for enhanced experiences across devices and browsers, promoting seamless interactions. Streamline asset distribution, eliminate duplicates, and utilize intelligent filters based on size and tags for efficient asset retrieval.

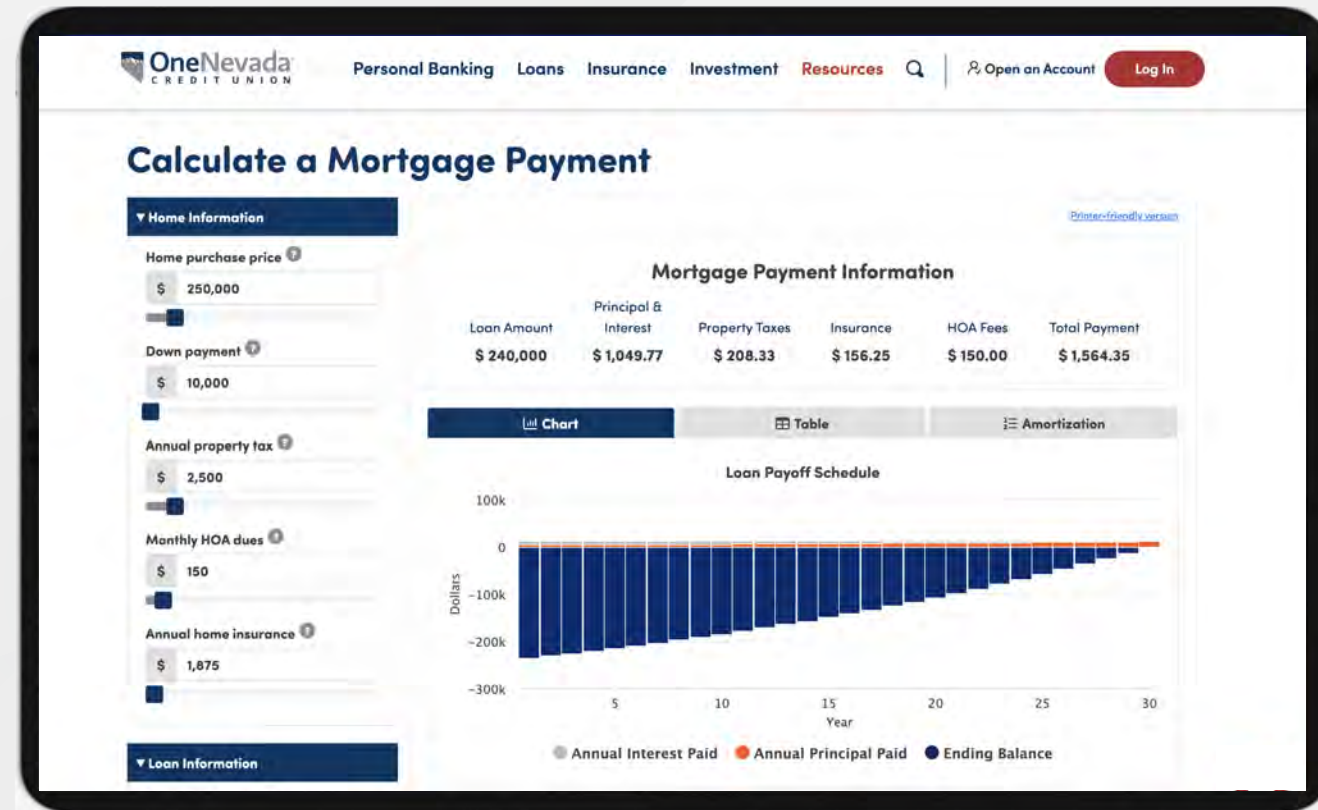
- Digital Asset Manager (DAM) ensures asset consistency
- DAM with Image Search Optimization using Google Vision API



## Customer Acquisition (SEO-First)

As search experiences continue to evolve, credit unions have a prime opportunity to drive digital growth by prioritizing SEO and embracing the Google Search Generative Experience. By adapting to these changes and delivering tailored experiences optimized for search engines, credit unions can enhance their online visibility and attract more potential members. This proactive approach not only ensures that credit unions stay relevant in the digital landscape but also positions them for sustainable growth in the competitive financial market.

- Built-in SEO for higher search visibility and driving customer acquisition
- Optimized for Google search generative experience
- Advanced schemas for content discovery
- Local listings in Google, Apple, Bing
- RPF forms and calendars for appointment setting



## Interactive Conversion Tools

Implementing interactive tools such as loan calculators and rate tables on your credit union website can significantly enhance customer engagement and drive tangible business results. These tools empower potential borrowers to make informed decisions by providing estimates for loans and mortgages, as well as transparent information on interest rates. By offering these resources, credit unions can guide users through their financial journey, fostering trust and loyalty. Experience a significant increase in revenue and leads upon transitioning to the Milestone platform.

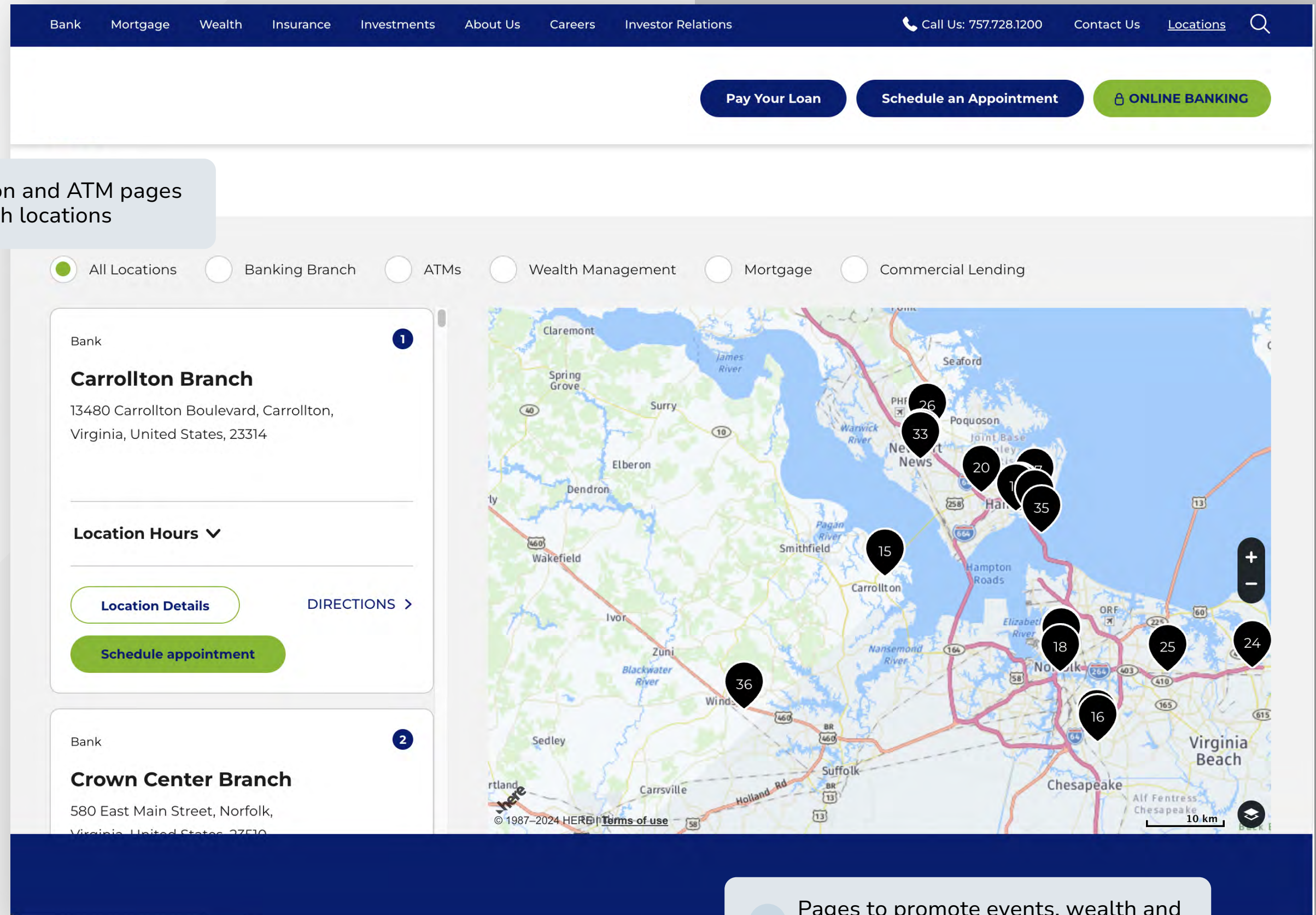
- Calculators for loan and mortgage estimates
- Rate table for credit union
- Focused customer journeys for 15-30% increase in revenue or leads

## Personalized Experiences

Incorporating personalized experiences into your credit union website is pivotal for enhancing member satisfaction and fostering stronger relationships. With the ability to deliver lightning-fast mobile experiences across all devices, including desktops and tablets, credit unions can ensure seamless accessibility for their members. Moreover, leveraging a Personalization platform supported by a Customer Data Platform enables the creation of a comprehensive customer profile, facilitating tailored messaging and interactions.

- Super-fast mobile experience on desktop, mobile, tablets
- Personalization platform supported by Customer Data Platform to create a customer one view and deliver personalized messaging to credit union members on the website





## Location Pages

Credit unions are required to maximize customer engagement and visibility by optimizing location pages on your credit union website. Highlight branch locations, ATMs, events, and investment offers to provide valuable information to members. Enhanced visibility of these offerings fosters stronger connections with members and promotes active participation in credit union events and services.

## Compliance

Credit unions are required to maintain the integrity of their website by ensuring ADA-conformance and GDPR/CCPA compliance. Built-in features and ongoing monitoring guarantee ADA-conformance beyond site launch, while embedded ADA conformance APIs streamline the process. Compliance with GDPR and CCPA regulations further safeguards member data, promoting trust and security in your credit union's online presence.

- ADA-conformance – not just when the site is launched but on an ongoing basis
- Built-in ADA conformance APIs
- GDPR, CCPA compliance of the credit union website



## Hosting and Security Infrastructure

Ensure the utmost security and reliability of your credit union website with robust hosting and security infrastructure. Guaranteed data, application, and host security coupled with reliable hosting infrastructure ensure zero downtime and maximum reliability, safeguarding member information and maintaining uninterrupted access to essential services.

- Data, application and host security guaranteed
- Reliability ensured with no down-times



## Total Cost of Ownership

Milestone platform for credit union website development, where integrated solutions for CMS, DAM, personalization, ADA conformance, and creative design are offered at the lowest total cost of ownership. With cost-effective hosting infrastructure and comprehensive features, optimize resources for maximum efficiency, ensuring a seamless and affordable website development experience for credit unions.

- Integrated platform with CMS, DAM, Personalization, ADA Conformance
- Cost effective hosting infrastructure
- Creative design and content



By prioritizing these features and capabilities in their selection process, credit unions can effectively leverage their CMS platform to enhance digital member acquisition and marketing efforts, **driving growth and engagement in an increasingly competitive digital landscape.**

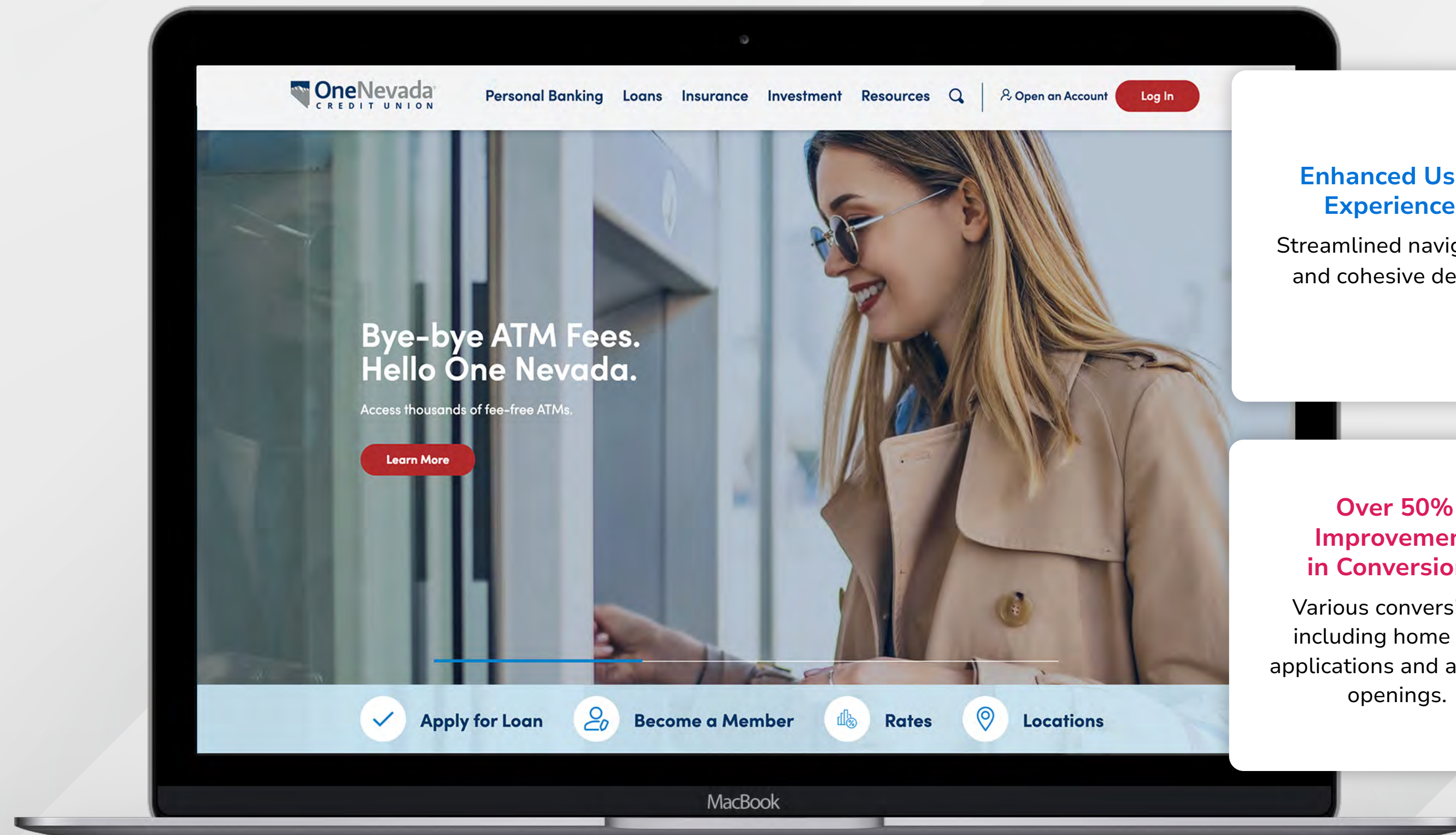
[Read the Blog](#)



3

# Case Study: Milestone CMS Platform Drives One Nevada Credit Union's 20% Loan Growth

Milestone's SEO-First CMS Platform stands out in the market for its unique ability to drive significant growth, as exemplified by the case study of One Nevada Credit Union. Unlike other platforms, Milestone's solution addresses the specific challenges faced by credit unions, such as dispersed information, complex content management, and manual rates update processes. By consolidating multiple sites into a unified platform, implementing a robust CMS system, and automating rates updates, Milestone enabled One Nevada Credit Union to achieve remarkable results.



**Enhanced User Experience**  
Streamlined navigation and cohesive design

**Improved Performance Metrics**  
Transparent tracking and measurement led to better understanding of user interactions

**66% Increase in Organic Traffic**  
Significantly higher traffic attracted more users to the platform

**Over 50% Improvement in Conversions**  
Various conversions, including home loan applications and account openings.

**20%+ Loan Growth**  
The focus on digital transformation translated into tangible financial growth, with loan growth exceeding 20%

# Ready to Take Your Digital Marketing Efforts to the Next Level?

Request a Demo