

leap group x  UMCU

# How Leap Group Made **University of Michigan** **Credit Union** Matter More

The University of Michigan Credit Union (UMCU) knows all about teamwork: it's the official mortgage partner and exclusive auto loan provider of the University of Michigan football team, as well as the official credit union sponsor of the Detroit Lions.



# The challenge:

But, like most financial institutions, UMCU was **struggling to stand out** in a sea of sameness and differentiate itself from competitors — many of which offered the same or very similar banking products. As a financial institution operating within a highly regulated industry, UMCU had, in the past, been understandably resistant to emerging digital media opportunities. However, their marketing team knew they **needed to advance digitally** to keep up in a changing marketplace and embrace the same digital tools and media channels that consumers were now using for their banking needs.





# Our approach:

When Leap Group was selected as UMCU's agency of record in a highly competitive search, we knew that **the first point of business would be to clearly define their brand**, including key messaging, points of parity, competitive differentiators and tone of voice, as well as audience personas and new consumers they'd like to target.





# Research methodologies:

At Leap Group, **we believe strong research is the foundation of any good work.** For our initial brand development with UMCU, this included focus groups with key stakeholders to identify challenges and opportunities, and to enhance expertise in UMCU's internal initiatives; a survey of hundreds of non-members about their experiences when choosing a new financial institution and their digital preferences; and our own careful analysis of the websites of our local competitors to gather insights that would be valuable for building the new UMCU website.





## Key findings:

Through the stakeholder interviews, we were able to uncover what made UMCU different from other credit unions, and through the general survey, what consumers really cared about. For example, we heard that, unlike other credit unions in the region, UMCU fosters a true sense of community, shared ownership, strong partnerships and personalized care. We also heard that consumers were looking for financial institutions with superior customer service, positive member and experiences and a seamless, easy-to-navigate digital experience. Together, these insights created the foundation for us to differentiate UMCU and help it truly **matter more** to its customers and its community.





# Identifying a unique opportunity:

It only took a few visits to UMCU offices to know that UM fans are absolutely crazy about UM athletics! Through our research and focus groups, we also learned that student members of the credit union were looking for a financial partner and consultant that was approachable and felt like part of the community – something big banks can't offer.

**UMCU had a unique opportunity to meet this key consumer segment literally where they were:** setting up activations on campus and providing

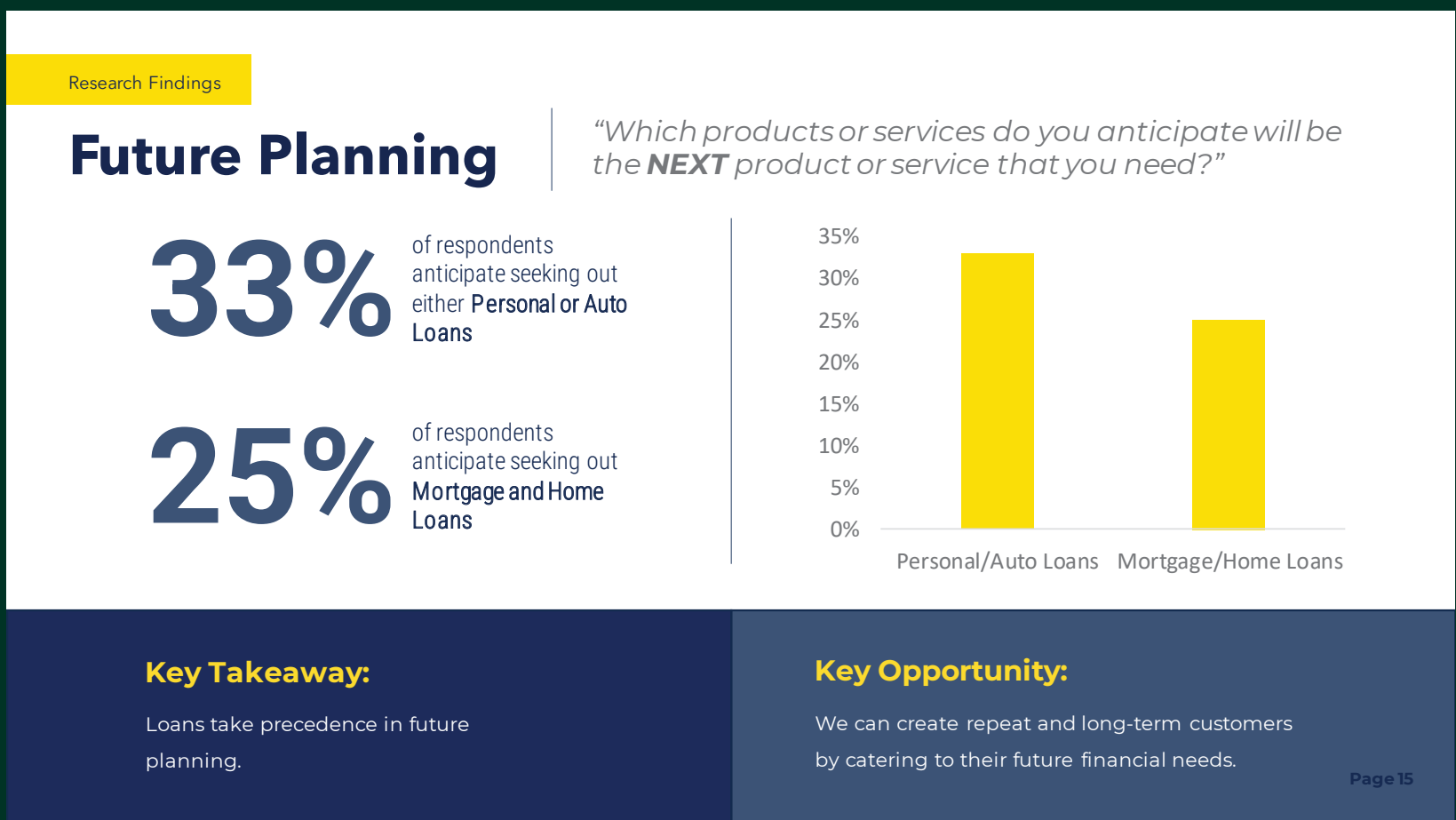
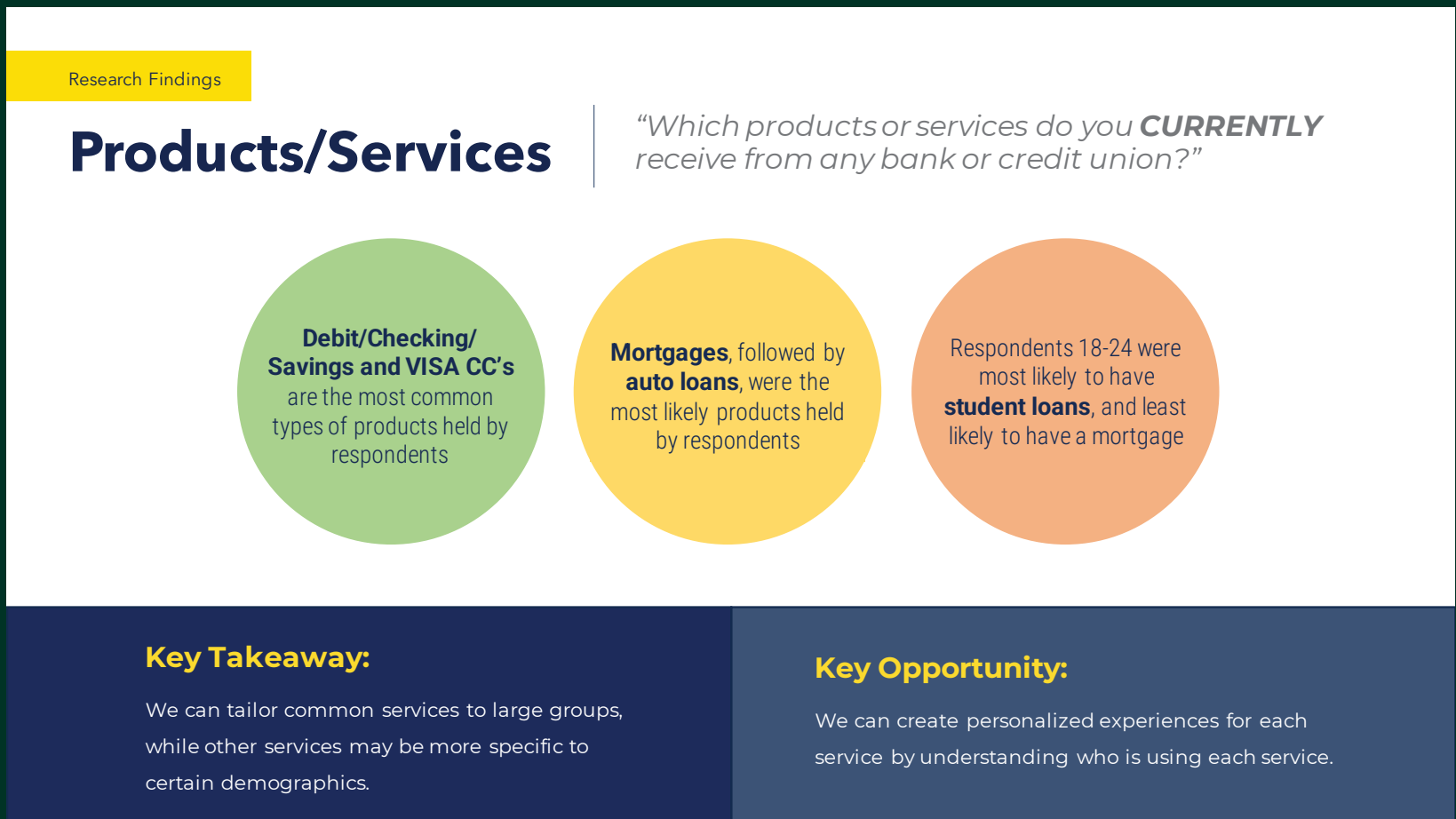
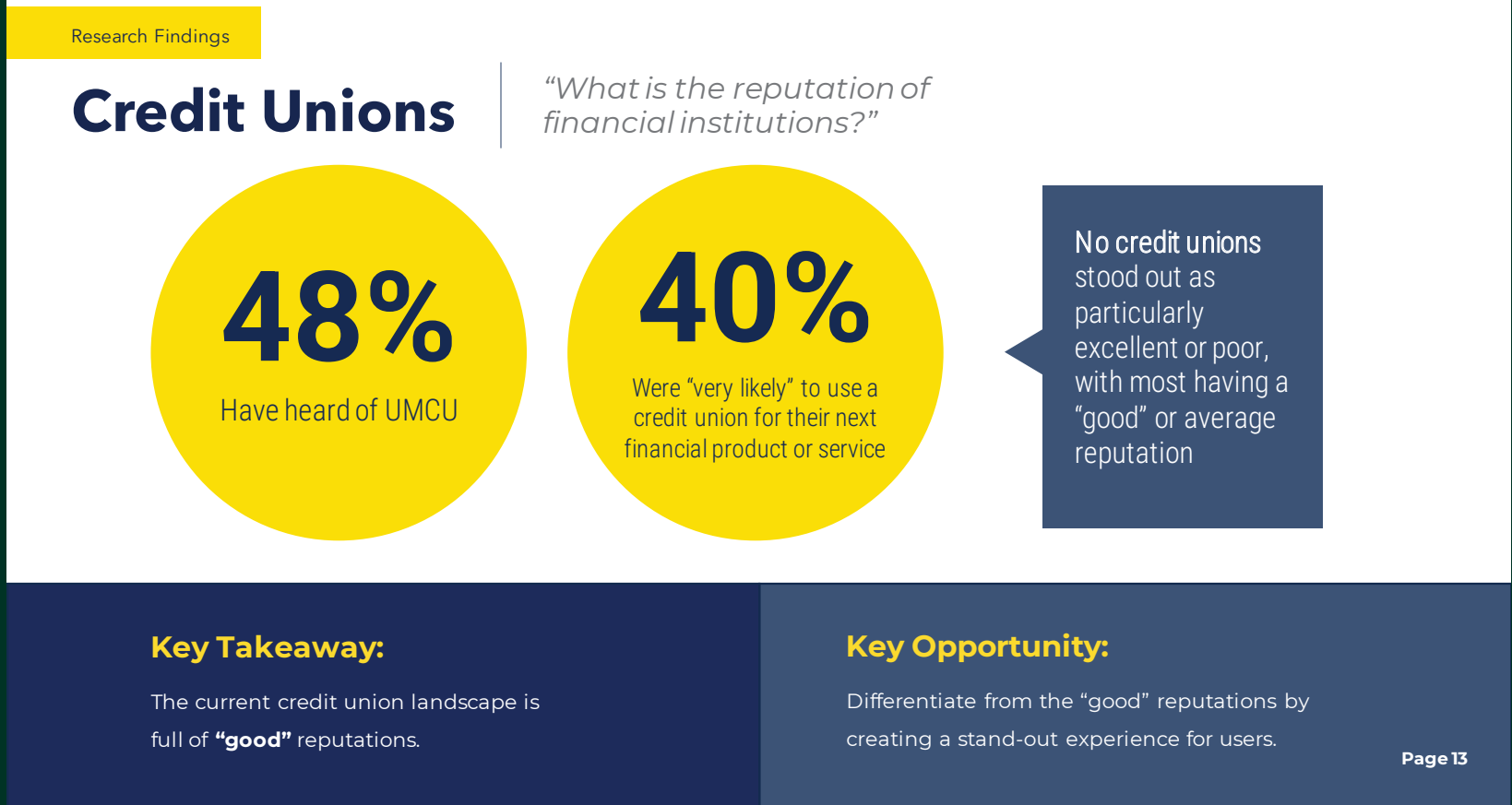
on-site financial workshops at the beginning of the school year to help students feel comfortable with something that is, in many cases, new and uncomfortable to them (money!). And, with a little help from Leap Group, UMCU was able to lean in all the way with the university segment, from tailgating at home games, to having a presence at bowl games, to celebrating players going to the NFL. In short, UMCU became a brand that mattered more to their audience in an approachable and highly authentic way.






# Digital experience audit:

But before UMCU could hit the playing field, there was one more thing they were missing: a digital playbook. Leap Group conducted a full digital experience audit, including websites, social media platforms, online conversation, search engine presence, news outlets, blogs, forums and more. After presenting UMCU with our audit, an entire digital experience program was born, along with a full website redesign and social media program, all designed to evolve UMCU into a digitally savvy brand.



# Audience personas:

Concurrent with the digital audit, **we conducted audience research, developing a comprehensive set of user personas**, from the youngest consumers who are just starting to earn money and looking for guidance (along with their guardians), through young adults, middle-aged professionals and empty nesters, all the way to satisfied retirees interested in estate planning and maximizing their charitable contributions. By building these specific audience segments, UMCU could now target and refine marketing tactics and strategy to the content and channels most relevant to that persona's needs.




Starting at Square One

**Tristan**

AGE: 13-17

"I don't know what I don't know. I need somewhere to keep my money, but I need guidance to understand how to get started."



Financial Newbie

**Angela**

AGE: 18-28

"Finance can be confusing, but I'm learning and growing. I still need guidance, but I'm feeling more confident with every step I take."



Figuring Out Finances

**Joseph**

AGE: 30-38


"Finance used to be complex, but now it's a means to secure my family's future and advance my career. It's about making smart choices with guidance to unlock new possibilities."



# Customer journey maps:

We also developed journey maps for each of the personas, specifying the UMCU services and messaging tactics that would **resonate most with them at every stage**, from awareness and consideration to conversion and retention. Armed with a clear understanding of their financial audiences, UMCU was now well on the path to mattering more to their customers, targeting them with the services and messages that were right for their needs, rather than overwhelming them with a lot of service offerings that weren't relevant to them at that stage in their financial journey.

Personas



Starting at Square One  
**Tristan**  
AGE: 13-17

SERVICES FOR TRISTAN

Student Accounts

Mobile Banking

Checking Accounts

Mobile Wallet

JOURNEY

1

Awareness: Word of Mouth, Guardian Recommendation

2

Consideration: Website (interactive tools), Educational Materials

3

Conversion: Digital form fill, Membership Application

4

Retention: Email, Social Media, Promotions

Page 47

Personas



Financial Newbie  
**Angela**  
AGE: 18-28

SERVICES FOR ANGELA

Student Accounts

Credit Card

Checking Accounts

Vehicle Loans

Mobile Banking

Student Loans

Mobile Wallet

Technology Loans

JOURNEY

1

Awareness: Word of Mouth, Web Search, Digital Ads, Events

2

Consideration: Website (interactive tools), Events, Offerings, Services

3

Conversion: Digital form fill, Chat Bot, Membership Application

4

Retention: Email, Social Media, Events, Promotions

Page 50

Personas



Figuring out Finances  
**Joseph**  
AGE: 30-38

UMCU SERVICES FOR JOSEPH

Checking Accounts

Mobile Wallet

Mortgages

Savings Accounts

Online Banking

Vehicle Loans

Business Accounts

Bill Pay

My Choice Loans

Mobile Banking

Credit Cards

IRAs

JOURNEY

1

Awareness: Been a member since his first savings account with UMCU

2

Consideration: Website (product + services information), customer review/testimonial, Branches near him, Low Rates

3

Conversion: Branch Visit, Website (form fills), Phone Call, chat bot

4

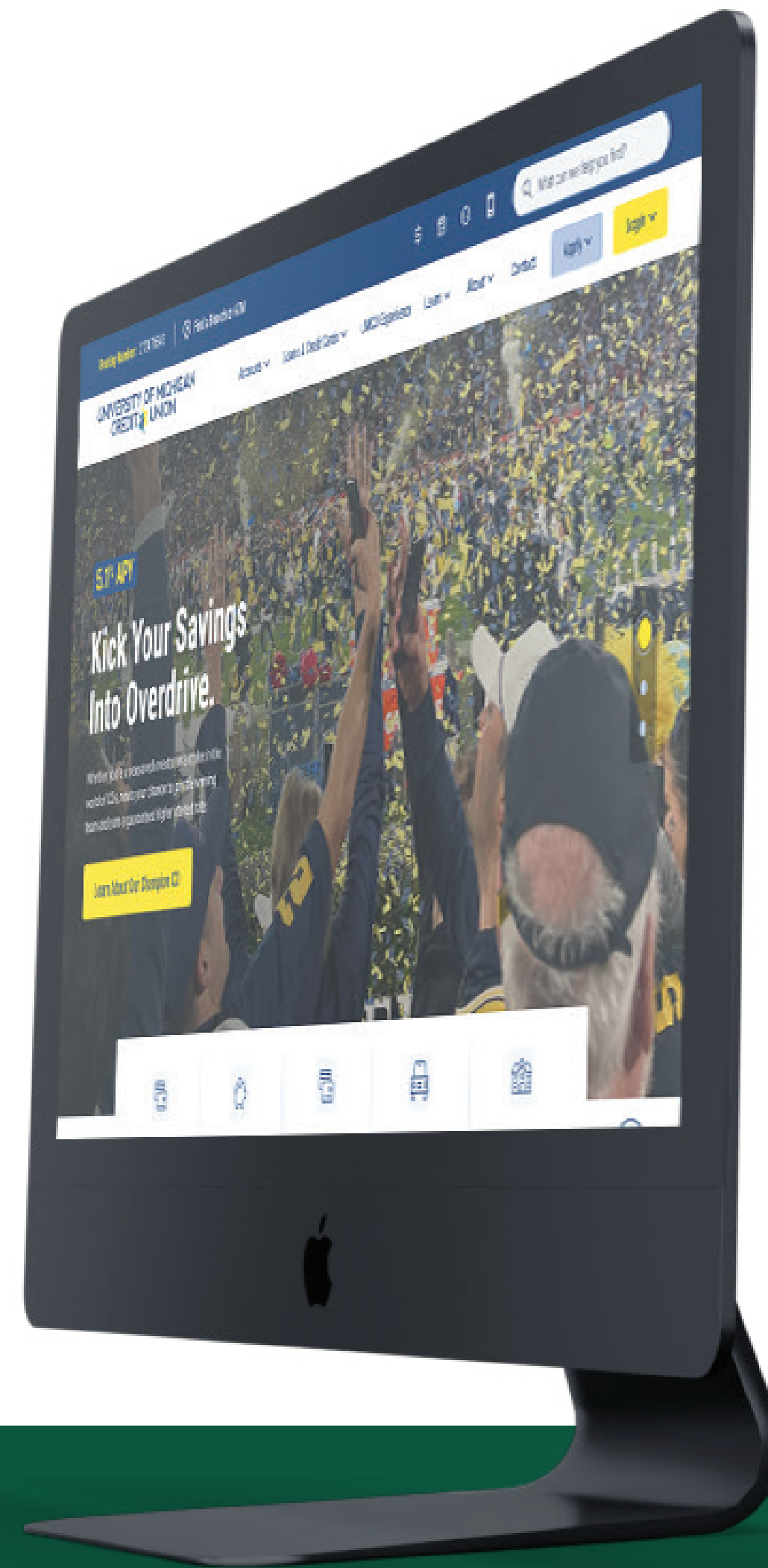
Retention: Landing pages with relevant lifestyle information, email, newsletter, personalized service offerings, Events, Promotions (401k, Business Offerings)

Page 53



# Site optimization:

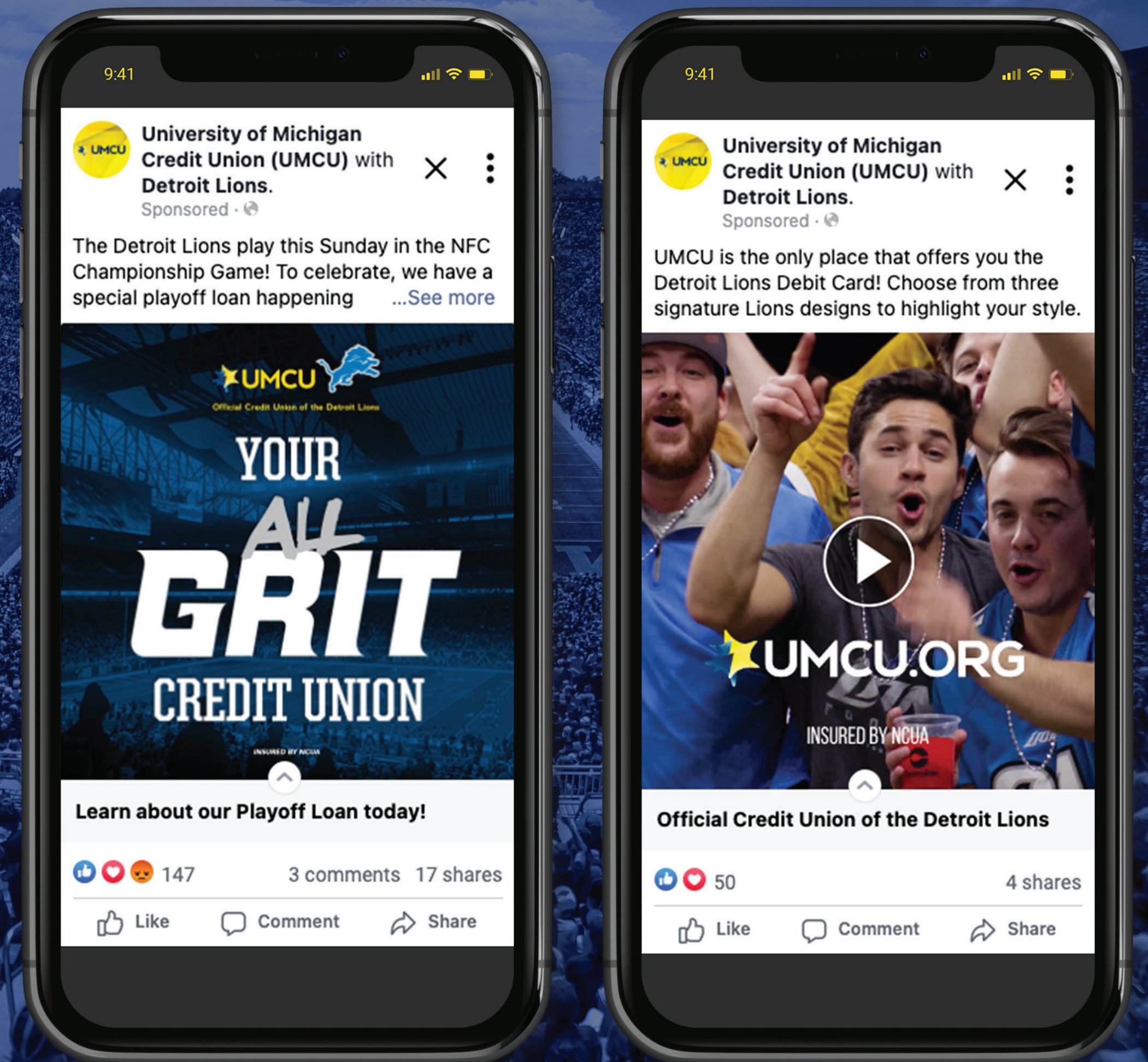
Another top priority, concurrent with the website redesign, was to optimize the site by creating dedicated landing pages — a first for UMCU. A new page with a trackable link was added for each event, **allowing us to paint the full picture of offline and online conversion for UMCU**. Those trackable pages would prove incredibly valuable in a short time, as UMCU was gearing up for a busy fall season with its sports sponsorships.





# Detroit Lions social campaign:

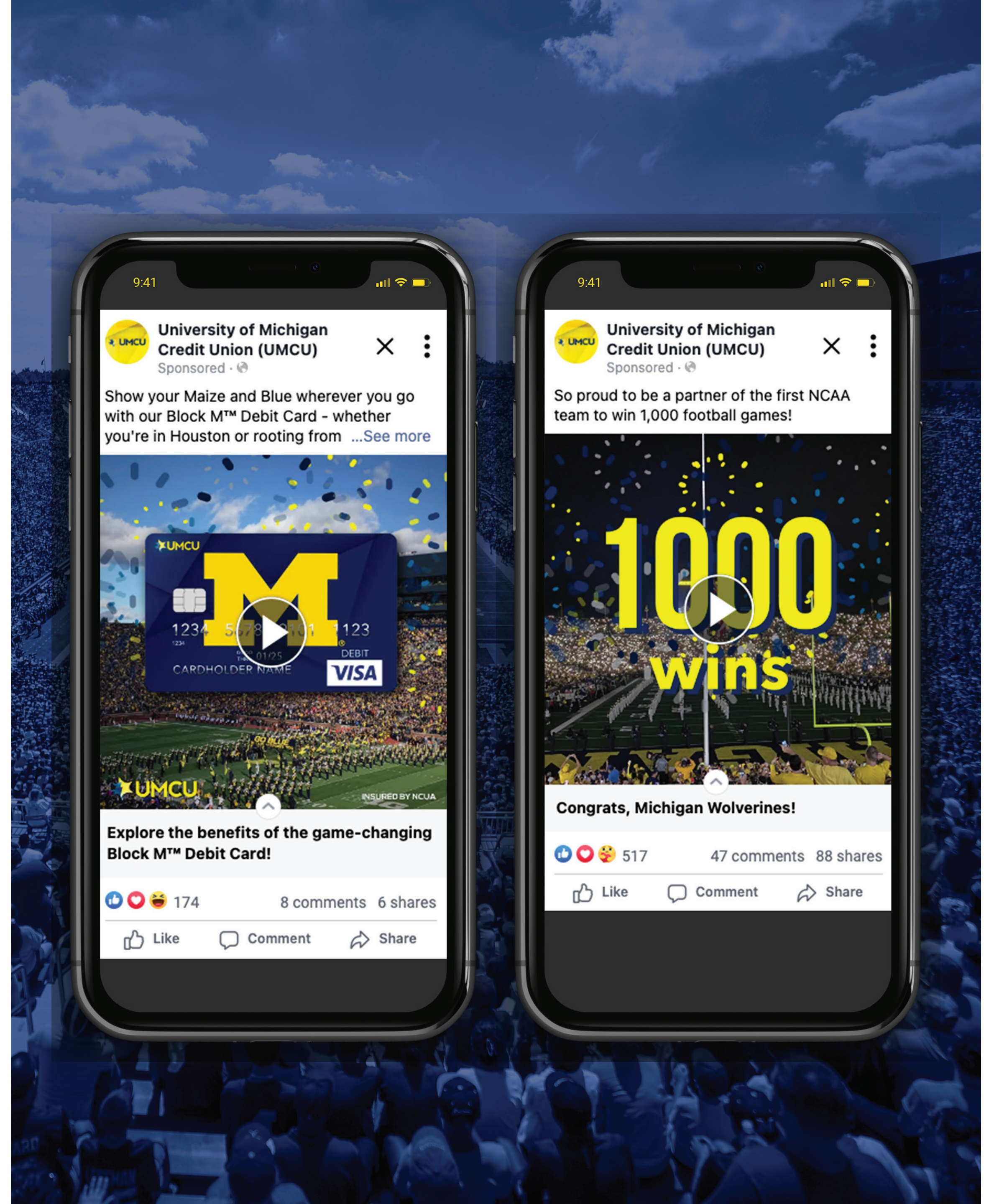
As luck would have it, our new social media program coincided with a remarkable season for both football teams UMCU sponsored. And the social and advertising campaign we ran during the 2023 Detroit Lions season, which saw them clinch the NFC North division title, also achieved remarkable success. Impressions, engagements, and link clicks surged compared to the previous year, notably peaking in December with **91k engagements on Facebook alone**. Campaigns focused on the Lions drove over **7.4k website clicks with a high click-through rate of 1.09%**, while a Touchdown Tailgate ad emerged as the standout performer, attracting the most clicks and maintaining the highest engagement rate, thanks to its enticing incentives.





# Michigan Wolverines social campaign:

Meanwhile, UMCU's social media and ad campaign for the Michigan Wolverines — which also happened to be their national championship season — was also gaining immense traction. Impressions, engagements, and link clicks surged since 2022, notably with a **1k+ follower increase across platforms**. Top content centered around the championship, with one post amassing 1.4k+ engagements. High-value engagement and clicks showcased the effectiveness of UM-centric campaigns, particularly the 1,000 Win IE ad, which boasted the highest CTR and engagement rate.





# In-person activations:

Leap Group was just as busy offline, working right alongside the UMCU marketing team at national events, helping amplify their table presence and driving memberships with fun activations — another first for UMCU — centered around the two teams. For both the Rose Bowl and the College Football Championship Alumni Tailgate, the Leap Group team developed a **strategic mix of traditional and digital media**, such as signage with QR codes, which allowed us to measure the number of scans connecting fans with the UMCU website.





# On-site conversions:

At the Rose Bowl, gamification of lead generation enabled UMCU to quickly capture leads: potential customers would supply their name, email and phone number for a chance to win cash prizes, autographed footballs and other premium swag. And at the Alumni Pep Rally, Leap Group helped sign up new credit union members on site, taking their name, email and phone number to initiate the application process with the enticement of a box of team swag once they got home and completed the application. **Overall, the efforts resulted in an impressive 17% conversion rate** — and a UMCU marketing staff that was even more impressed by the offensive drive of the Leap Group team in pursuing on-site conversions.





# Ongoing analytics + optimization:

Following a very exciting season, the football teams went back to training, and the Leap Group team went back to the office to leverage the year’s metrics, analytics and reporting to **develop new social and digital media recommendations** to help ensure UMCU capitalized on the season’s success and kept the momentum going. Recommendations included incorporating story placements, consistent messaging, concise ad copy, and captivating videos, as well as creating instant experiences (a relatively new ad unit offered by Meta) and targeted ad groups.

Overall Metrics (Paid & Organic)

764K IMPRESSIONS

122K ENGAGEMENTS

7.6K LINK CLICKS

4.8% ENG. RATE

0.99% CTR

2023 Overview

UMCU's social media and advertising campaign during the 2023 Detroit Lions season, which saw them clinch the NFC North division title, achieved remarkable success. Impressions, engagements, and link clicks surged compared to the previous year, notably peaking in December with 91k engagements on Facebook alone. Top content included a celebratory post and promotions for the Touchdown Tailgate. Campaigns focused on the Lions drove over 7.4k website clicks with a high click-through rate of 1.09%, demonstrating the effectiveness of UMCU's strategies. The Touchdown Tailgate advertisement emerged as the standout performer, attracting the most clicks and maintaining the highest engagement rate, thanks to its enticing incentives. Recommendations focus on looking at what other NFL teams are going with their sponsors and how UMCU could take advantage of other like-minded campaigns.

Page 4

Organic Social

142 Published Posts

87K Impressions

4.1K Engagements

4.8% Eng. Rate

282 Link Clicks

↑ 903.5 %

↑ 337 %

↓ 56.4 %

↑ 109.1 %

Organic Insights

- There have been significant increases in overall impressions, engagements and link clicks since the 2022 season, which can be attributed to paid efforts.
- Since August, UMCU has garnered over 128k total engagements across the board. There was a spike in December where UMCU's Facebook page saw 91k engagements alone. This spike can be attributed to the Detroit Lion's season reaching its peak.
- The end of season congratulatory post was the top performing piece of content with over 346 engagements. The second leading pieces of content revolve around the Touchdown Tailgate.
- Facebook dominates in terms of overall engagement and followers. However, LinkedIn maintains the highest overall engagement rate of 7.8%.

umcudetroit

The Detroit Lions truly gave it their all this season and we are so proud to be their Official Credit Union. You could hear the collected pride in the air just about anywhere you went from the grocery...

CONGRATULATIONS to the DETROIT LIONS on their LEGENDARY SEASON!

umcudetroit

Total Engagements

346

Reactions

261

Comments

10

Shares

12

Post Link Clicks

—

Other Post Clicks

62

umcudetroit

Check out our photo gallery from last week's Touchdown Tailgate. 📸📸📸 Stay pumped for a weekend that has to top any other "tail" Michigan Football - Signed Jack Fox #NFL Lions Football - Barry...

umcudetroit

Total Engagements

282

Reactions

25

Comments

3

Shares

2

Post Link Clicks

—

Other Post Clicks

249

umcudetroit

Football fans! You have a chance to win some epic experiences and prizes at the #TouchdownTailgate. 📸📸📸 Stay pumped for a weekend that has to top any other "tail" Michigan Football - Signed Jack Fox #NFL Lions Football - Barry...

umcudetroit

Total Engagements

238

Reactions

26

Comments

7

Shares

10

Post Link Clicks

66

Other Post Clicks

134

Page 6

Paid Social

CAMPAIGN	IMPRESSIONS	CPM	LINK CLICKS	CTR	ENG.	ENG. RATE	POST SAVES	POST SHARES	SPENT
Detroit Lions Congratulations Playoff Win	22,622	\$11.05	249	1.10%	355	1.5%	-	1	\$250.00
Lions-UM Tailgate Instant Experience	102,913	\$8.26	3,612	3.51%	41,058	39.89%	1	7	\$850.00
Detroit Lions Reg. Season & Playoffs Instant Experiences	329,756	\$10.78	3,338	1.01%	64,148	19.45%	3	32	\$3,555.00
Detroit Lions Debit Card - Awareness	221,885	\$2.17	207	0.09%	12,846	5.79%	1	2	\$480.64
TOTAL	677,176	\$7.58	7,406	1.09%	118,407	17.5%	5	42	\$5,135.64

Campaign Insights

- Campaigns centered around the Detroit Lions drove over 7.4k clicks to the website at a high CTR of 1.09%. We also saw over 118k total engagements.
- The top performing ad was the Touchdown Tailgate IE which generated the most clicks and maintained both the highest CTR and engagement rate. We attribute the success of this campaign to the incentives offered at the tailgate.
- We recommend consistent messaging with "Always On" campaigns capture UMCU's overall message while adding in timely campaigns like such throughout the year.
- We also recommend using captivating yet concise ad copy in future campaigns paired with a video that is less than 30 seconds long.

EXCLUSIVE Signed MERCHANDISE

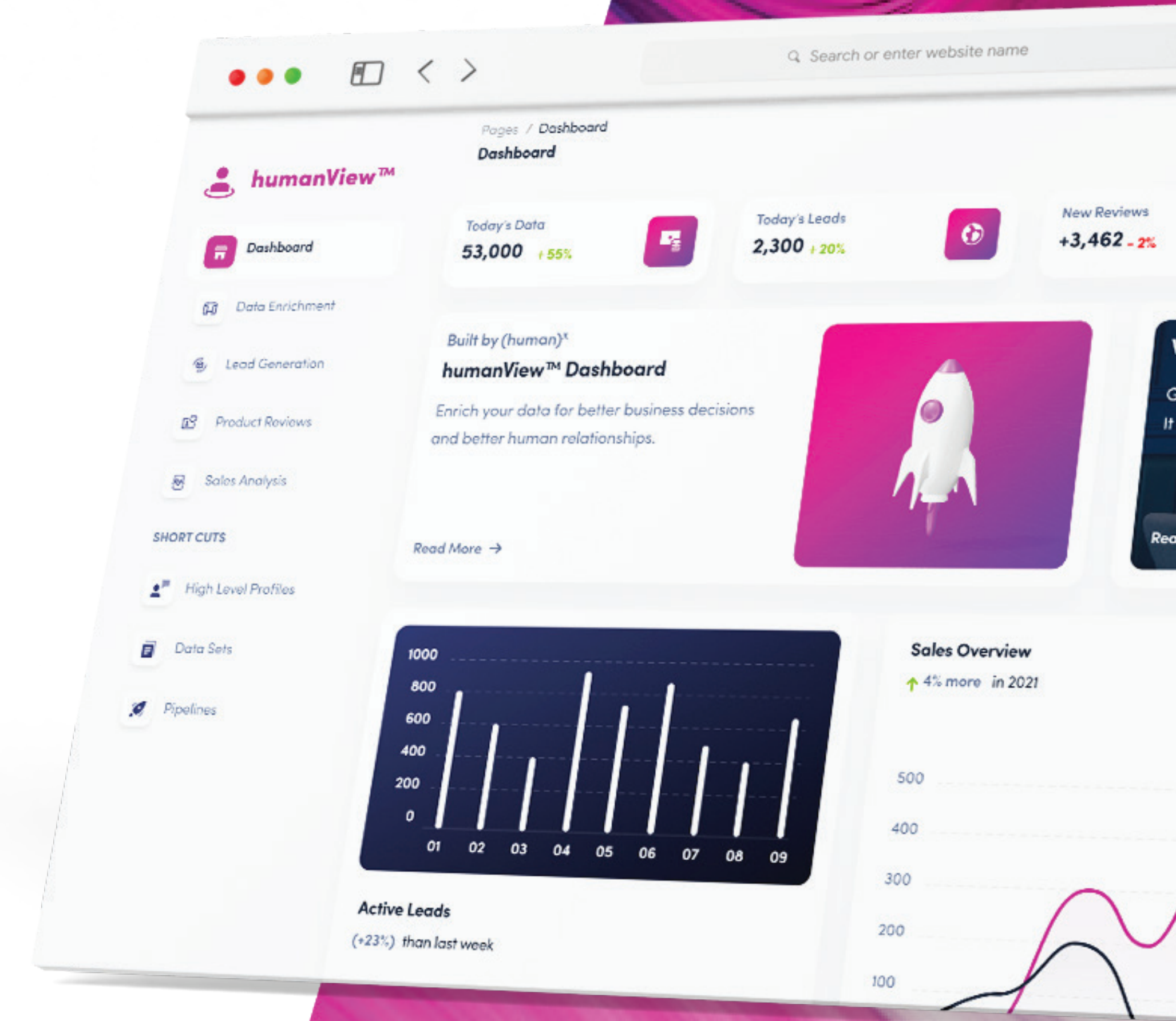
Page 8



# Data enrichment + predictive analytics:

Along with optimizing current campaigns, we embarked on a new initiative to help UMCU deepen their engagement with their best customers. As many of their customers use only one product from UMCU, we wanted to develop strategies that could not only attract new customers wanting a broader banking relationship, but also convert existing one-product members to multiple products and the belief that UMCU is more beneficial for their overall financial wellness than its competitors.

**Working with their first-party data, we utilized our own proprietary software, humanView, to scrub and enrich that customer data with upwards of 1,000 additional demographic and psychographic data points.** This allowed us to create highly accurate predictive models that analyzed the attributes of UMCU's best customers, enabling us to carefully craft messaging tailored to those customers' needs and interests.





# Senior consulting program:

In addition to account management and project management, UMCU also engaged Leap Group in a senior consulting program. This bespoke offering allowed the credit union's C-suite to have direct access to Leap Group leadership for questions about marketing strategy, execution, activations, and general business decisions, as well as assistance with presenting board reports and weekly updates for their senior leadership team, and crafting strategy and vision documents as an organization. Through this senior consulting program, we were able to provide recommendations from an unbiased, outside perspective, while truly becoming an extension of our client's marketing team — **and that's certainly a WIN in our books.**





**764K**  
IMPRESSIONS  
(2023 UMCU Lions)

**4.8%**  
ENG. RATE  
(2023 UMCU Lions)

**358K**  
IMPRESSIONS  
(2023 Michigan Wolverines)

**3.8K**  
LINK CLICKS  
(2023 Michigan Wolverines)

**122K**  
ENGAGEMENTS  
(2023 UMCU Lions)

**7.6K**  
LINK CLICKS  
(2023 UMCU Lions)

**47.1K**  
ENGAGEMENTS  
(2023 Michigan Wolverines)

**1.06%**  
CTR  
(2023 Michigan Wolverines)



**.99%**  
CTR  
(2023 UMCU Lions)

**13.12%**  
ENG. RATE  
(2023 Michigan Wolverines)



leap group