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OCCU #Adulting Campaign Tactical Plan

July 20, 2016

Campaign Concept: Adulthood

Our Approach

Create a digital campaign targeting students and parents by leveraging Week of Welcome as a content-gathering opportunity.

Congrats! It's An Adult

The start of college is a giant emotional step for both student and parents. More than any coming-of-age birthday, it's the real point when sons and daughters become actual grown-ups. It marks this beginning of adulthood, and OCCU wants to celebrate this new beginning and all the potential that comes with it.

Taking responsibility for finances, beginning with getting a bank account, is a big step towards embracing your inner adult. But with OCCU, you're never completely on your own. You'll get all the support you need, and parents can rest assured that students are in good hands.



How this digital campaign works

Ads: Message on banners would tease the microsite. They will drive to a quiz to find out “What’s your level of adult?” It will allow users to compete against each other in a Newlywed-style question/answer game.

PreRoll Video / Social: Leveraging the content captured from Week Of Welcome, we will quote actual funny things said –or- humorous one liners “Don’t buy pizza for your entire dorm.” Parents would be targeted with slightly different messaging along the lines of “How does your kid Adult?”

Social: (Ongoing for Millennial Members)

Once they’re members, they can enter to win an OCCU giveaway or contribution to their account by sharing stories of adult financial decisions on social media using #OCCUadulting. OCCU can select the best ones to feature on their social media channels and on other channels for the campaign.





How this digital campaign works (Cont'd)

Microsite:

- What's Your Adulting Level? Newlywed-style game where students and parents can face off about financial adulting-knowledge. Added incentive to sign for an OCCU savings account to get \$100 in your starter "adulting" savings account.
- The microsite would feature a curated section where parents can share nuggets of wisdom from their years of financial experience with Millennials.
- Leads generated from the game will receive a series of simple Skimm-style emails that provide fun and easily digestible financial information geared towards Millennials

Email Campaign: All communications would feature humorous instructional *How To/How Not To Adult* content that contains financial adulting advice. We can have personalized content for students and parents.

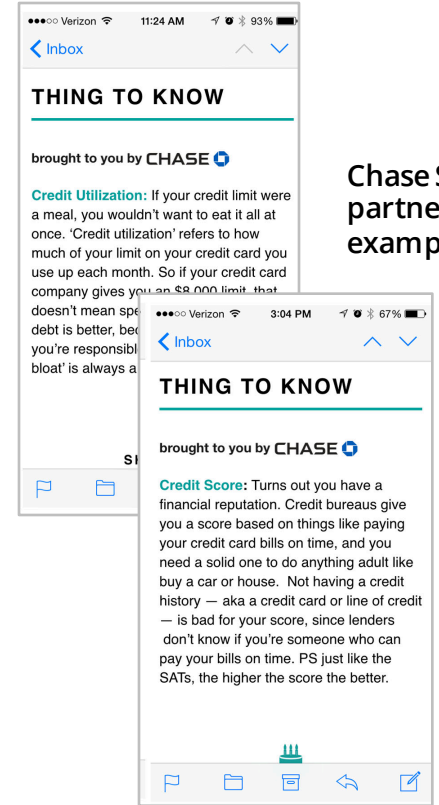
Example Do's and Don'ts:

DON'T sign up for the first credit card that gets you a t-shirt.

DON'T fund your roommate's 3AM mobile app idea.

DON'T use a gas card to fund a seven-state road trip.

Content would also include a series of DO's that will divide you from the financial rookies.



Chase SKIMM partnership example

Microsite Example

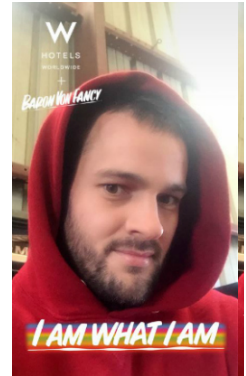
<https://www.societyofgrownups.com/>



How it works at Week of Welcome

We would engage both students and their parents on the street at Week of Welcome. Think of it as a genuine celebration of making it to college and a congratulations to parents for getting their child to this point.

- **What's Your Adulting Level?** - in this Newlyweds style game, OCCU would film students and parents facing off as they answer maturity-related questions, many of them financially related. We'd get humorously to compare their answers and reward them with gifts
- **Giveaways for students** include grown-up things
- **Photo Souvenir** – Parents and students can still take a photo in front of a standing backdrop with a tongue-in-cheek "Congrats On Your Adult" message. Parent/student can, submit an email address for digital delivery and share via social using a custom #OCCUadulting Snapchat Filter
- **T-shirts:** hand out shirts with sayings such as "I Do My Adulting At OCCU" and "Proud Parent of An Adulting Kid" for parents
- All elements drive to our microsite **OCCUadulting.com**



2016 Campaign Overview

Key Insight

Because we know...

Millennials don't know what a credit union is

Strategy

We need to...

Educate them about credit unions

Tactic

By...

Demonstrating why a credit union is better than other financial institutions

Audience

- College students
- Millennials living in and around Eugene

Key Messages

1. Joining a credit union is easy for UO students
2. Credit unions are local/not a big bank
3. OCCU gives back to the community
4. OCCU has a strong digital banking presence

Goals

- 500 new millennial members
- Brand awareness among UO students



Phases

PHASE **ONE**

PRE-CAMPAIGN WORK

Week of Welcome

September 22-23, 2016

- Duck store Branch Event
- Asset Collection

PHASE **TWO**

Organic Content + Editing

September 22 - October 13, 2016

- "Unedited" social media content
- Microsite live
- Sharing UGC
- Blog Posts

PHASE **THREE**

Digital Campaign

October 13 – December 9, 2016

- Banner ads
- Pre-roll
- Social ads
- Email campaign



Timeline

Phase/Task	Start	Finish	Duration	July			August				September					October				
				29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45
Phase 1: Pre-Campaign and Ramp Up	7/18	9/26	10w 0d																	
Microsite	7/18	9/9	7w 4d																	
Creative and Collateral	7/18	8/17	4w 2d																	
Logistics and Other	8/15	9/7	3w 2d																	
Creative Production	8/29	9/20	3w 1d																	
Phase 2: Week of Welcome	9/21	9/25	0w 4d																	
Duck Store Branch Event	9/22	9/24	0w 2d																	
Content and Asset Collection	9/21	9/25	0w 4d																	
Phase 3: Organic Content and Editing	9/26	10/12	2w 2d																	
Phase 4: Digital Campaign	10/14	12/9	8w 0d																	
Total																				

Phases	Tasks	Welcome Week	Campaign Launch
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Pre-campaign

Creative

Microsite

- UX
- Design
- Development

Branded Things

- Coffee Mug (2)
- T-shirt (2)
- Campaign Post Card (2)
- Reusable Bag (2)
- SnapChat Filter
- Repeat Banner
- Emails (6)

Logistics

Gift Ordering

- Reusable Bags (300 + 50)
- Gift Cards (100)
- Amazon Echo (50)
- T-shirts (320 + 50)
- Coffee Mugs (50 + 50)

Other

- Order Repeat Banner
- Set up media
- Coordinate organic content capture
- Set up SnapChat Filter
- Set up Email Campaign
- Set up incentives

Week of Welcome
Campaign Asset Collection



What's Your Adulting Level

To get both students and parents engaged, we will run a Newlywed style game. Participants will be asked adulting-themed questions about themselves and then the other person will be asked to guess how their opponent answered.

Goal

Capture humorous images and video of parents and students

Roles

Host: Angie Dow

Recruiting: IQ + OCCU Marketing Staff

Prep: IQ + OCCU Marketing Staff

Ad footage: Professional photog and videog

Organic Content: Kiley + IQ





Students

Students who participate in our newlywed-style game, will receive an “adulting gift bag” containing an Amazon Echo (to keep up with NPR, of course), OCCU+adulting themed coffee mug, t-shirt, and reusable bag. We will also include branded collateral with information about the incentive to sign up for an account.

Like last year, gift cards will be handed out in front of the Duck Store as ice breakers to help us recruit students for the game.

- Amazon Echo
- Reusable tote bags
- Coffee mugs
- T-shirts
- Gift cards to Duck Store, Netflix, Spotify, Dutch Bros. Coffee, Amazon





Parents

We know parents heavily influence their college students' financial decisions. Reaching out and engaging with parents during Week of Welcome will not only spread more brand awareness about OCCU, but will also help start a dialogue between parents and their students about financial education and money management.

We will give away reusable bags branded with OCCU and #adulting components, such as "My Kid Adults at OCCU" or "Proud Parent of an OCCU Adult." These bags will be filled with the following items:

- Branded coffee mug
- OCCU branded postcard
- T-shirt

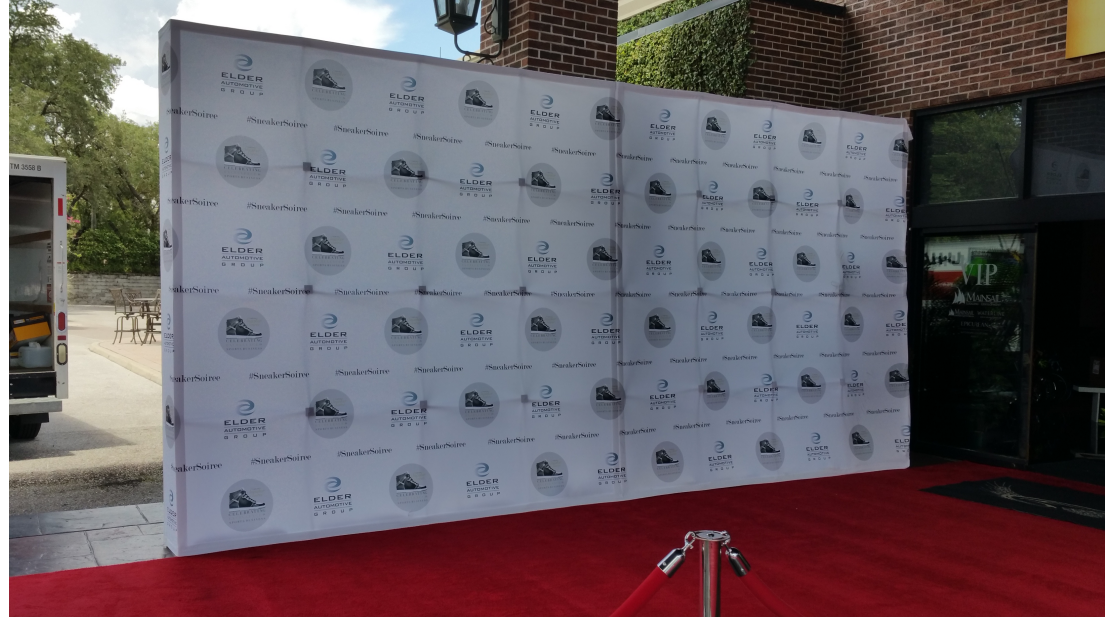


Photobooth



Step and Repeat Banner

- We will build a repeat banner that will allow students to take photos in front of an adulting-themed backdrop.
- Our photographer will take professional photos that can be emailed to the participant to generate leads. To do this we will send a single email to all leads with a link to find and download their picture from a database.
- We will create a custom snapchat filter accessible to all students across the UO campus with the hashtag #OCCUadulting to encourage UGC.



<http://www.signartetc.com/step-and-repeat-s/52.htm>



Snapchat Filter

- We will create a custom Snapchat geo-filter for students to document their campus experiences during Week of Welcome.
- The geo-filter will include #adulting and OCCU branding components to strategically align with the overall campaign concept.
- Geo-filter dates: September 22 – 23 (2 days)
- Geo-fencing location: University of Oregon campus



Digital Campaign



Media Plan

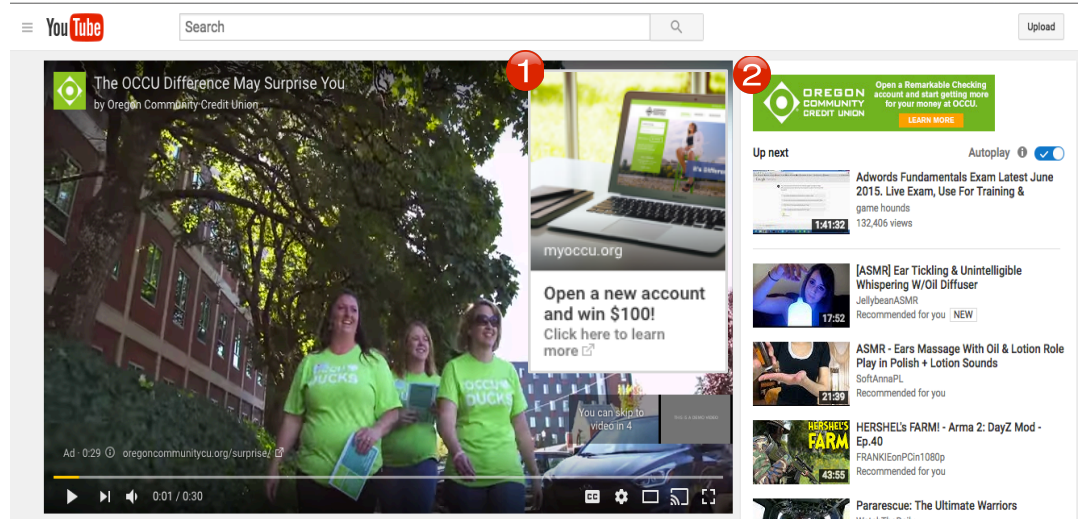
MEDIA	October					November				December				Est. Net Total	% of Spend
	M	M	M	M	M	M	M	M	M	M	M	M	M		
DIGITAL DISPLAY	3	10	17	24	31	7	14	21	28	5	12	19	26		
YouTube In-Stream :15 and :30 Video Pre-Roll						10/13 - 12/9								\$12,000	60%
										DISPLAY TOTAL				\$12,000	60%
SOCIAL															
Facebook Promoted Video Posts, Website Conversion Posts						10/13 - 12/9								\$4,000	20%
Instagram Sponsored Video and Photo Ads						10/13 - 12/9								\$2,000	10%
Twitter Promoted Video Tweets, Website Cards						10/13 - 12/9								\$2,000	10%
										SOCIAL TOTAL				\$8,000	40%
										MEDIA TOTAL				\$20,000	100%



YouTube

In-Stream :15 and :30 Video Pre-Roll Ads

- Videos will appear pre-, mid-, or post-roll while viewing content on desktop and mobile devices
- Run both non-skippable (:15) and skippable (:30) placements to diversify creative
 - OCCU will only be charged for views longer than 5 seconds
- 1. Utilize card annotations to drive viewers to campaign microsite
- 2. 300x60 companion banner appears along the top of the right sidebar; this banner will also drive viewers to the microsite
- Targeting parameters:
 - Millennials 18-34 living in and around Eugene
 - Relevant interests and keywords
 - Related YouTube channels (competitive conquering)

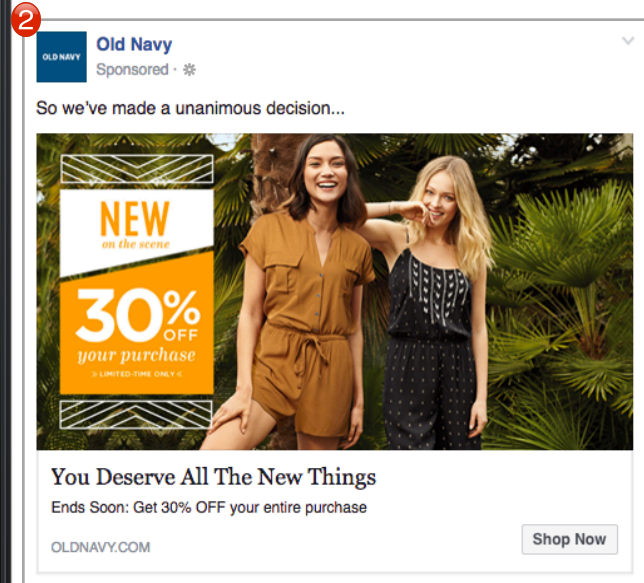
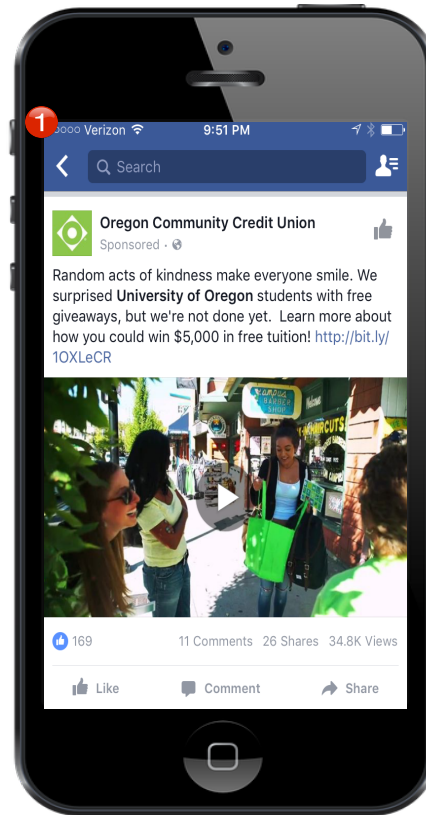




Facebook

Promoted Posts

- Ads will run in the newsfeed on both desktop and mobile devices, and within the Facebook app
- Utilize a combination of video and website conversion ads to meet multiple campaign objectives
 1. Video Ads will drive social engagement
 2. Website Conversion Ads will drive clicks to the microsite
- By having multiple creative variations in rotation at once, we will be able to optimize toward the best performing ads throughout the media flight
- Ads will include a 'Learn More' CTA button to incite further traffic to the microsite
- Targeting parameters:
 - Millennials 18-34 living in and around Eugene





Instagram

Sponsored Ads

- Ads will run in the Instagram mobile app feed
 - The primary objective of these ads is to drive website clicks and conversions to the campaign microsite. By having multiple creative variations in rotation at once, we will optimize toward the best performing ads throughout the media flight
1. Photo ads will include an image carousel (up to 4 images can be included in carousel)
 2. All posts will include a CTA button to further incite website clicks
- Ad copy will include campaign hashtags (i.e. #adulting)
 - Targeting parameters:
 - Millennials 18-34 living in and around Eugene

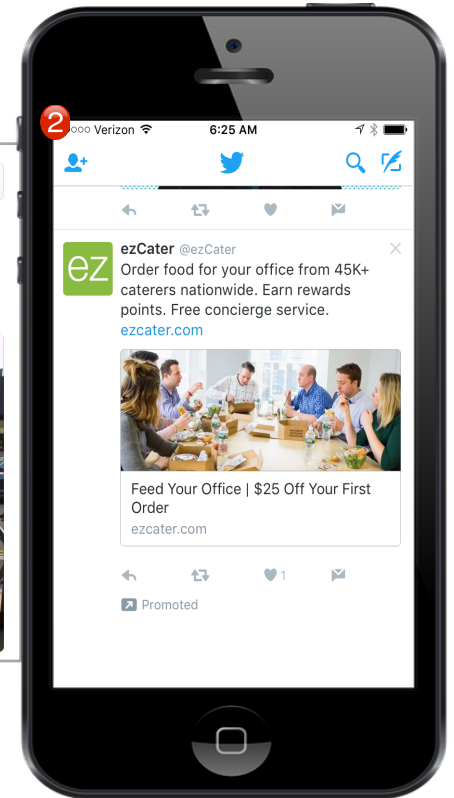




Twitter

Promoted Tweets

- Ads will run in the timeline on both desktop and mobile devices, and within the Twitter app
- Utilize a combination of video tweets and website cards to meet multiple campaign objectives
 1. Video tweets will drive social engagement
 2. Website Cards will drive clicks to the microsite
- By having multiple creative variations in rotation at once, we will be able to optimize toward the best performing ads throughout the media flight
- Targeting parameters:
 - Geo-targeted to Millennials in Eugene
 - Relevant keywords, handles and interests





Microsite

Goal

The primary goal of the website will be to generate leads for an email nurturing campaign to follow. Ultimately we want to drive memberships, but we realize that isn't likely to happen from an ad immediately. It will require a nurturing campaign.

Content

- Humorous quiz that asks users to find out what level adult they are by answering a few financial education questions
- Focus primarily on financial education in quiz and in results
- Log in with Facebook Connect or manually by providing an email address
- If users opt to use Facebook Connect we can personalize their experience with their photo and name, generating a sharable image of their profile picture with an OCCU+adulting branded image with their score (ex. Noah is 63% Adult). This will allow us to collect email addresses and generate shareable content.



Email

Goal

Deliver humorous financial education content to Millennials that leads them to membership.

Cadence

A series of six (6) emails will be developed that will be sent every three (3) days to new leads

Content

In the Skimm style, the emails will be easily consumable, humorous, and educational. Keeping with the adulting theme, the content will increase in specificity over time leading to a strong CTA to join OCCU. Each email will contain the join CTA, but the placement and priority of the CTA will increase in prominence over time. By the fifth email, it is the primary purpose of the email.

Delivery

We will use Mailchimp to automatically collect and trigger emails. Mailchimp forms will be used to alert game participants as well as trigger the drip campaign.

Measurement



Measurement

Key Performance Indicators

Primary KPI: Net New Millennial Members

Other KPIs:

- Email Open Rates
- Microsite Visits
- Banner Ads: Unique Reach, CTR, CPC
- Pre-Roll and Social Video Ads: Unique Reach, Video Views, View-Through Rate, Video Completion Rate, Cost Per Video View
- Social Ads: Unique Reach, Website Clicks, CTR, Cost Per Website Click
- Leads Generated

Measurement Plan

- IQ will closely monitor media placements with a daily check-in to optimize targeting, etc. as needed.
- IQ will create a weekly report of digital campaign performance that includes media, email, microsite performance beginning October 13, 2016 and running until the end of the campaign.



#Adulting Campaign

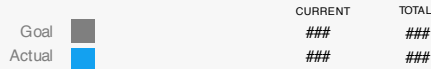
WEEK 1 OVERVIEW

Summary and analysis here.



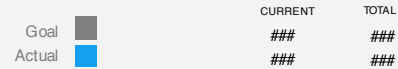
ADVERTISING

PRE-ROLL VIEWS



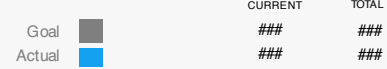
MICROSITE

TOTAL VISITS

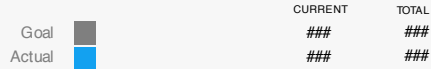


EMAIL

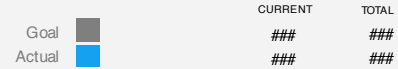
OPEN RATE



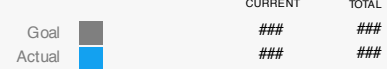
DISPLAY CTR



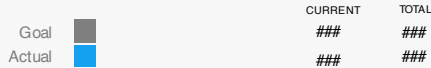
QUIZ COMPLETION



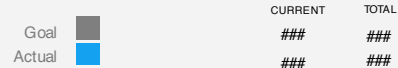
UNSUBSCRIBES



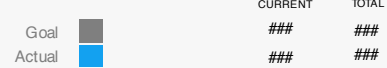
TOTAL REACH



LEADS GENERATED



CLICKS TO WEBSITE



Week 1 Week 2 Week 3 Week 4 Week 5 Week 6 Week 7 Week 8 Week 9

— Media Spend — Total Reach — Leads Generated — New Accounts