



**TAYLOR**

# Solutions For Credit Unions

Enhancing efficiency while strengthening the member experience



## Who We Are

Taylor is among the top five graphic communications companies in North America. Headquartered in North Mankato, Minnesota, we are a team of more than 10,000 client-driven experts with operations spanning 25 states and eight countries.

We use deep knowledge of the financial services industry to strengthen the brand experience of credit union members, enhance business efficiency and support revenue growth for our clients. This industry-leading market expertise enables us to deliver end-to-end solutions that meet the unique requirements of credit unions. Our Managed Services Provider (MSP) program is one example. Taylor's MSP offering provides a single point of access to the unique mix of credit union experts, process and technology you need to run and grow your organization.

## The Value We Deliver to Credit Unions

### Strengthening Member Experience

- Utilize innovative signs and graphics to turn your retail locations into an experience your members will remember.
- Maintain brand consistency across channels, campaigns and communications.
- Use a mix of digital and physical communications to introduce relevant information and offers at key stages of the member lifecycle.

### Enhancing Business Efficiency

- Serve all of your print and marketing needs through a single source.

- Create a positive brand impression at every touchpoint with corporate identity programs.
- Ensure data flows seamlessly and streamline postal optimization.

### Growing Revenue

- Leverage technology to enable sales with the right tools to grow revenue.
- Plan, produce and distribute targeted point-of-purchase materials that drive increased branch sales.
- Achieve better bottom-line results through high-quality execution at every touchpoint.

## Decades of Industry Experience

Taylor is a trusted partner to hundreds of credit unions nationwide as well as:



**The Top 10  
U.S. Retail Banks**



**12 of the Top 14  
Financial Institutions**



**7 of the Top 9  
Insurance Companies**



# The Simplicity of a Single Source

CORPORATE IDENTITY & BRANDING

PROMO MARKETING

SIGNS & GRAPHICS

PRIME LABELS & PACKAGING

MARKETING, DATA & ANALYTICS

DIRECT MAIL PROGRAMS



GIFT & LOYALTY

COMMERCIAL PRINT

DOCUMENT MANAGEMENT

WAREHOUSING & DISTRIBUTION

LABELING SOLUTIONS

CUSTOMER COMMUNICATIONS MANAGEMENT

BRING IDEAS TO LIFE

INCREASE BRAND AWARENESS

ACHIEVE MEANINGFUL RESULTS

INSPIRE ENGAGEMENT

ENHANCE EFFICIENCIES

GAIN DEEPER INSIGHTS

CREATE BRAND CONSISTENCY

BUILD BRAND LOYALTY

## Solutions for Every Touchpoint

### Commercial Print

- Brochures
- Buck slips
- Folders
- Mailers

### Corporate Identity & Branding

- Business cards
- Custom-printed Post-it® Notes
- Holiday cards
- Letterhead

### Customer Communications Management

- Account statements
- CD renewal notices
- eAdoption programs
- Renewal notices

### Direct Mail Programs

- Campaign strategy and design
- Hyper-personalization techniques
- List sourcing and hygiene
- Results measurement

### Document Management

- Cash tickets
- Coin envelopes
- Forms
- Checks and MICR products

### Marketing, Data & Analytics

- Cross-sell strategies
- Customer journey mapping
- Data analytics and modeling
- Mail, email, SMS text and digital direct response

### Promotional Marketing

- Apparel programs
- Awards and incentives
- Community events
- Writing instruments

### Signs & Graphics

- Point-of-sale displays
- Standees and stanchion signs
- Tabletop signs
- Wall, window and floor decals

### Warehousing & Distribution

- Credit Union in a Box
- Custom collating and kitting
- Secure warehousing
- Welcome kits



# Credit Union Expertise

Taylor conducts ongoing market research to better understand the trends, challenges and emerging strategies of key industry verticals. The credit union vertical is a key example. We hold ongoing discussions with our credit union clients and attend leading industry conferences to ensure we deliver strategic value in all aspects of the relationship such as:

- Enhancing data analytics capabilities
- Exploring advanced technology such as AI, 3D printing and augmented reality
- Navigating regulatory and compliance changes
- Providing seamless, efficient multichannel delivery
- Redesigning the digital experience for members
- Removing friction from the customer journey

# Our Solutions In Action

We apply this special expertise on behalf of credit union clients in a variety of ways. The broad scope of our capabilities and the flexibility of our service model enable us to tailor our offerings to the unique needs of each client:

- Taylor has print management programs in place with hundreds of credit unions across the U.S.
- We warehouse and distribute all types of branch materials (operational, marketing, point-of-purchase (POP) signage, promotional items) for credit unions of all sizes.
- Many of our clients utilize our secure customer communications management services to provide credit union statements and notifications to their clients.
- Our Branch Profiler is an online portal that ensures the optimal quantities of POP materials are produced and distributed. In addition, it gives the ability to supply localized campaigns so credit unions can promote the products that are most appropriate based on the demographics of each branch.
- Taylor's proprietary secure printer solutions have been implemented by regional credit unions throughout the U.S. to reduce costs and mitigate fraud.
- The majority of our credit union clients take advantage of our web-based marketing portal to ensure brand compliance, quality and speed to market.
- We supply visual communications and signage programs to improve member experience and promote credit union brands.

# Certifications and Proficiencies

Taylor holds all of the industry certifications needed to serve credit unions with speed, quality and unwavering security:

- SOC 2 Type 2 Audit controls
- GLBA compliant
- HIPAA compliant privacy and security controls
- PCI Merchant Level 2 compliant processes
- Return Path ISP Monitoring (email SPAM)
- SSAE 16
- ISO 9001:2008
- HITRUST certification coming late 2018
- FISMA compliant

## Industry-Leading Technology

Taylor's technology suite is a perfect fit for financial institutions. From supporting simple business card orders to complex multichannel marketing campaigns, our web-based tools are flexible, scalable and designed to fit any budget. We can implement a secure standalone platform or integrate our technology with your systems via single sign-on, empowering your team to place orders and manage assets 24/7.

### Centralized Ordering Platform

Create workflow efficiencies and gain control of both your brand and your budget through a secure online ordering technology.

- Central point of access for fast ordering
- Real-time inventory management
- For both on-demand and inventoried items

### Print Management

- Print, warehouse, inventory, kit and ship or mail items

### Promo Marketing

- Print-on-demand company store solutions for promotional products and apparel

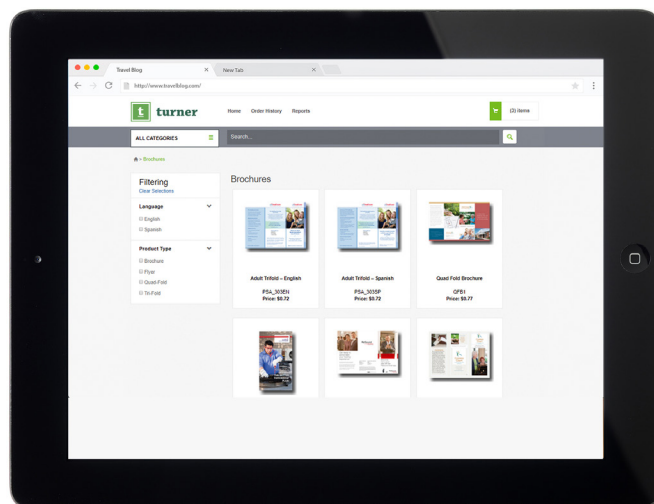
### Kitting

- Online kitting project management and execution

### Branch Profiling

Ensure each credit union branch receives the right product at the right time with our Branch Profiler tool.

- Produce and distribute optimum material quantities
- Localize your point-of-purchase mix based on branch demographics
- Track and manage kit materials across sites, regions and campaigns





# Strengthening Member Experience



## Improve the Member Experience with Signs & Graphics Solutions

In today's competitive community credit union marketplace, visual merchandising is needed to help distinguish your brand. You need point-of-purchase (POP) signage that connects with members, on-brand and within budget. Taylor's designers are champions at finding innovative solutions, while considering every practicality and requirement. We can provide interior or exterior POP signage that educates members about your products and services. Because we're experts in printing, substrates and design, we'll recommend the best alternatives to help you balance both the economics and eye appeal to bring success to your marketing efforts every time.

In addition, there's no better way to help members or visitors feel comfortably oriented to your branches than with signage from Taylor. Within moments of entering your lobby, they need to take in data that will help them navigate to the correct destination or find what they're looking for. We offer both permanent and semi-permanent interior and exterior signage that will capture their attention and accurately embody your brand.





## Leverage Multichannel Communication Strategies for Deeper, More Profitable Relationships

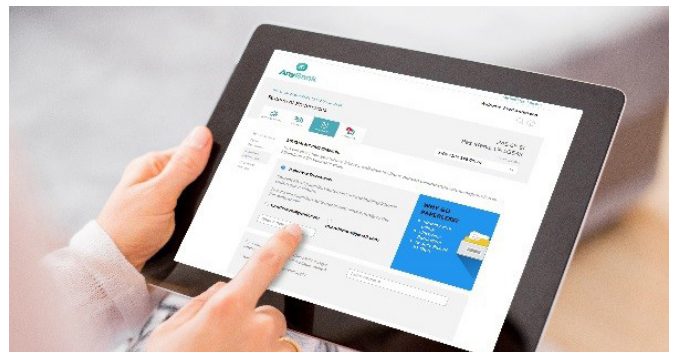
To make the most of your statements and notifications, it's critical that your channels work together to honor consumer preferences for print or electronic communications. Taylor's preference management and eAdoption strategies ensure member choices are met to improve satisfaction and retention, create a better overall experience for your loyal relationships, and evolve your credit union to true multichannel communications.

These touchpoints are a direct line to your members and 80% of them get opened and read. Strengthen every document you deliver by aggregating and transforming data into impactful member touches that inspire action. Utilize your member information to increase personalization, add tailored offers and improve the overall experience of print and digital communications.

And, with our online portal, you can see exactly what communications are being created, for which members, and

at what stage of production. You even have the power to alter the content of messages on the fly anytime, day or night:

- Decrease statement costs
- Execute personalized offers
- Improve member satisfaction
- Increase digital adoption



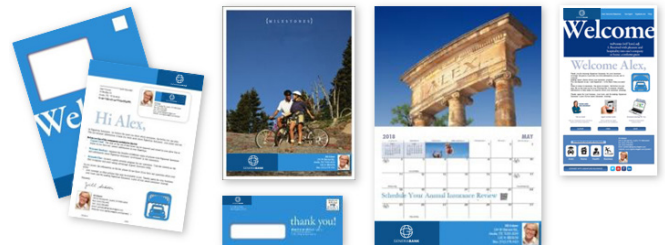
## Make Your Direct Marketing Programs Impactful and Effective

Taylor can help you make the most of your direct marketing with our data analytics and execution programs. You will quickly find out which integrated marketing programs are working and continually optimize your bottom-line marketing performance.

We can append a broad array of data elements to your database and compare that to a sample of households in the targeted marketing area. Applying our analysis tools, Taylor can help you better understand and target your member personas by understanding dominant demographic characteristics such as:

- Age, income, marital status, presence of children, interests and buying behaviors
- Geographic segmentation
- Life-event triggers (e.g., moves, recent marriage, new parent, etc.)

Our experts help you interpret results to improve your direct marketing performance and move toward complete multichannel delivery.





# Enhancing Business Efficiencies



## Create a Positive Impression at Every Touchpoint with Quality Corporate Identity Products

In a world of digital communications, corporate stationery products are one of the most visible embodiments of your credit union's brand. From business cards and stationery, to the personal touch of a hand-written notecard, this is your opportunity to create a connection with your members.

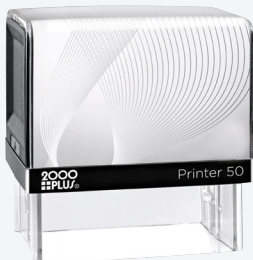
At Taylor, we make it easy to provide your team with the tools they need to inform members, make an acquisition or launch a new brand. We offer production methods at every price level, from economical digitally printed items to high-end engraved or embossed products.

By making corporate identity part of your overall program, you'll make it easier for employees to get what they need faster and prevent maverick spend. Color consistency and brand uniformity will be guaranteed. The result will be higher-quality items with documented lower costs.



## Simplify Daily Credit Union Tasks with Custom Stamps and Embossers

Custom stamps and embossers can improve accuracy and increase efficiency. They allow you to easily change taglines or promotional messages. Using a vibrantly colored message stamp on a member's cash back envelope can draw attention to new services or promotions such as your web address, mobile app name or a higher interest rate on CDs.



### Taylor commonly provides:

- Check endorsement stamps
- Teller stamps (for coding and dating deposits)
- Notary public stamps
- Signature stamps

Taylor has all the answers to your financial stamp needs. In addition to the traditional stamps that use separate pads, we also provide self-inking and pre-inked message stamps in a variety of ink colors and sizes.





## Achieve Operational Excellence, Improve Quality, Reduce Cost and Build Member Loyalty through Intelligent Print Management

Taylor provides a single point of access to the powerful and diverse resources of more than 80 Taylor companies to deliver a comprehensive array of innovative products, technologies and services.

- Design and manage customized, optimized print solutions based on best practices and analysis of your credit union's current needs and goals.
- Increase ordering efficiency and optimize resource use by enabling a diverse user base to place orders 24/7 from their workstations.
- Offer customization and product options while controlling your corporate identity and halting rogue spend.
- Eliminate obsolete inventory and manage spending with real-time reporting options that put key data right at your fingertips.

- Increase accuracy and save time and effort with collaborative workspace and project management options.
- Realize cost savings of 10%-20%.



## Simplify Branch Rebrands and Campaign Refreshes with Warehousing & Distribution Services

Let Taylor coordinate the kitting and distribution of both operational documents and marketing materials to make life easier for local managers, as well as corporate staff. Our Credit Union in a Box solution delivers a complete and accurate set of materials needed to run a branch, helping to ensure they operate smoothly, are in compliance and promote the appropriate products and services. The process is ideal for new branch openings, rebranding and campaign refreshes.

- Efficient fulfillment and print-on-demand under one roof
- Advanced notification provided to branches
- Color-coded labels by department or product
- Stronger compliance with regulations and brand standards
- Negotiable items shipped separately
- Call center support desk
- Receipt tracking and confirmation



# Growing Revenue



## Boost Member Satisfaction and Employee Engagement with Promotional Marketing Programs

Taylor is uniquely positioned as one of the largest promotional product distributors in the nation as well as one of the industry’s largest suppliers. This dual leadership position enables us to drive cost savings, offer unbeatable product selection and maintain greater control over production quality. The result is a promotional marketing capability that is optimized for the wide-ranging needs of the financial services industry.

Clients rely on Taylor for promotional marketing programs to facilitate employee recruitment and recognition, reward premier credit union members, and promote the brand throughout the community. Examples of our most popular products include:

- Apparel
- Awards and recognition
- Bags and totes
- Calendars

- Drinkware
- Holiday cards and gifts
- Keychains
- Picture frames
- Technology accessories
- Writing instruments, and more



## Utilize Commercial Print Techniques for High-Impact Ways to Educate, Advertise and Inform

Our financial clients utilize Taylor’s wide range of internal commercial print facilities and market experience to meet the unique needs of the industry. We help them create brand awareness and generate new sources of revenue while using our scale economies on presses, paper and logistics to drive down production costs. Taylor is also known for its ability to:

- Guarantee color consistency
- Ensure tight version control
- Comply with precise brand standards







# Taylor Streamlines Bank's Branch Marketing Operations

## Challenge

A regional bank in the Northeast wanted a better way to supply branded grand opening materials to hundreds of branches. Each location needed up to 75 items — from nameplates and promotional products to banners and signage — to comply with federal and state regulations. Having bank staff order materials from 40 different suppliers was inefficient and the bank's headquarters lacked sufficient space to stage and assemble orders. Up to six bank employees would spend a full week preparing shipments to individual branches and the bank was paying exorbitant freight costs.

## Solution

As a provider of printed materials to the bank for several years, Taylor augmented its existing e-commerce portal to further streamline the ordering and distribution of branch materials. We uploaded branch and employee data to our internal system and generated orders for personalized teller stamps, business cards, and more — allowing the bank to supply materials to hundreds of branches simultaneously with minimal involvement of bank staff. Taylor provided the bank with:

- An automated determination of material quantity per branch based on information such as number of accounts and deposit levels
- Storage of externally sourced items at Taylor, saving the client money with one mass shipment to our facility rather than multiple shipments to bank branches
- Sorting and kitting of all materials for each branch, then palletizing, shrink-wrapping and labeling assembled shipments
- Meticulous quality control to ensure accuracy of contents and quantities
- Reduced costs through consolidated shipments of forms, checks and other operational documents with the grand opening materials

## Results

The bank realized significant financial and operational efficiencies with Taylor's profiling and automation solution.



## COST SAVINGS

Freight costs are minimized through consolidated shipments and leveraged carrier relationships.



## PRODUCTION EFFICIENCY

Faster and more accurate product distribution saves the bank the cost of their staff's time.



## SPEED TO MARKET

Intuitive data determinations and expert order assembly get materials to branches much faster.

# Learn More

Let's discuss your needs and how we can help.  
Contact us today to learn more about the many  
solutions available from Taylor.



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