

MAXIMIZING ROI THROUGH

Business Development

STRATEGIES THAT HELP DRIVE ENGAGEMENT AND ROI



Partnering with Our Retail Business

- In-Store Visibility: Leverage foot traffic to connect with customers during shopping.
- Senior Wednesday:
 - Held the first Wednesday of each month.
 - Set up tables with treats, swag, and information.
 - Outdoor setup when staffing and weather allow.
- Fry's Employee Pizza Party:
 - Hosted in Fry's breakroom with store manager's approval.
 - Includes pizza, swag, and service info.
 - Promoted via signage in key departments (pharmacy, meat, produce, etc.).



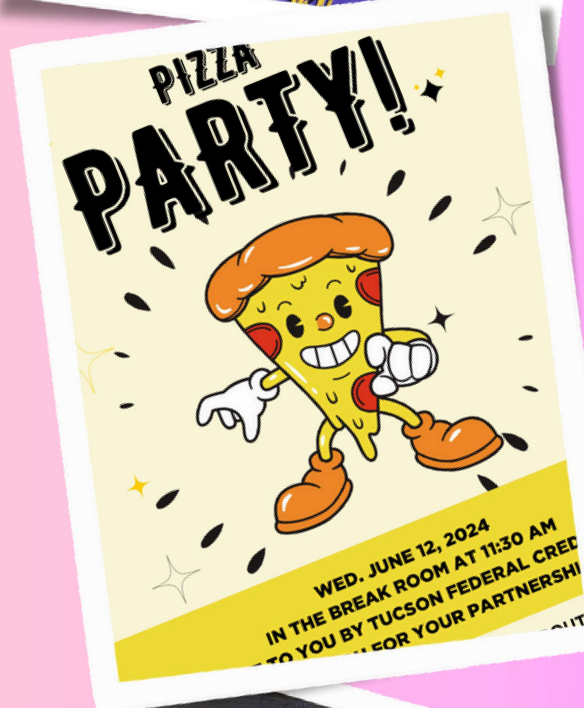
Collaborative Events

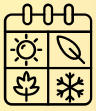
Team-Driven Outreach Ideas:

- These events were inspired by team input—specifically, a Member Advocate who expressed interest in visiting local clubhouses and pursuing outreach.
- Listening to your team's ideas can uncover unique and impactful community engagement opportunities.

Informational Sessions with Local Clubhouses:

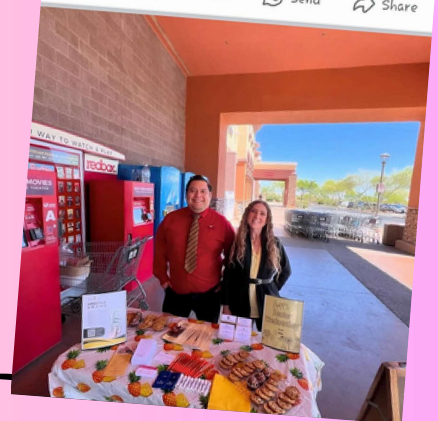
- Focus on current fraud trends and financial safety tips.
- Promote relevant products and services.
- Builds trust and positions us as a go-to financial resource.





Seasonal Campaigns

- Themed Decor (Every 45–60 Days):
 - Eye-catching displays aligned with featured products or services.
 - Designed to spark conversations and curiosity.
- Interactive Engagement:
 - Raffles or contests open to members and the public.
 - Drives participation and branch traffic.
- Campaign Ideas & Inspiration:
 - Use resources like Smart Cart, Google, Pinterest, and/or ChatGPT.
- **Previous Campaign Themes:**
 - Soar to New Heights with TFCU
 - Share how TFCU has helped you soar or what services can help you grow.
 - Prize: \$50 gift card
 - Get Ready for S'more Learning with TFCU
 - Guess the number of marshmallows in a container.
 - Prize: S'more-themed gift basket
 - Score Big Savings with TFCU (Football Theme)
 - Guess who will win the big game.
 - Prize: Tailgate basket (snacks, root beer, dip mix, Football Uno, mixed nuts)
 - Swing into 2025 with TFCU (Spring Training Theme)
 - Share your best financial tip or savings idea.
 - Prize: \$50 Big 5 gift card



Marketing & Social Media Exposure

- Capture photos during events.
 - Send to Marketing for social media sharing.
 - Highlights our local presence and community engagement.

My name is Carly Lilley, and I've worked in the credit union industry since 2003. I joined Tucson Federal Credit Union in 2014 as a Member Service Specialist at the same retail location I now proudly manage. Over the years, I've learned that the only constant is change. Whether adapting to major shifts like COVID-19 or evolving how we connect with our members, flexibility and responsiveness are essential to how I lead and serve.



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