

## MAXIMIZING ROI THROUGH

# Business Development

## STRATEGIES THAT HELP DRIVE ENGAGEMENT AND RDI

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- 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.).

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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



## Q: Capture photos during events

- 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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