



- Lead and campaign management software developed by a Forbes Best-of-Class (2024) credit union in Iowa
- Increase leads and conversions, not staff and budget
- Become a lead magnet and optimize for growth

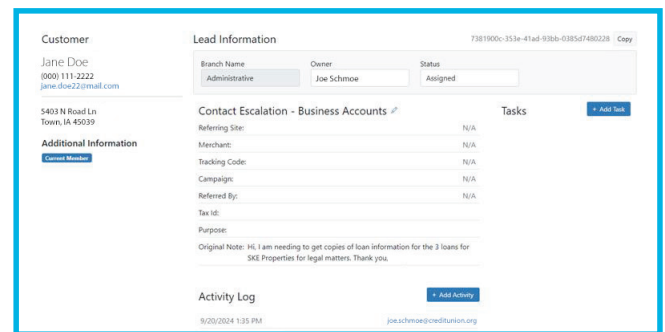
Is your credit union connecting **to enough** of the right people - **early enough** in their journey and **fast enough** once they've shown interest - to influence their decisions?

SimplyFocused offers a single, high-impact inbound/outbound lead and campaign management SaaS solution. Designed to help credit unions automate their lead management efforts, attract and capture growth opportunities, enhance sales accountability, and gain critical data insights.

Built on top of your website, no deep integration deployment is required, instant time to value, and a user experience so simple that even your most tech and process-resistant staff will love it!

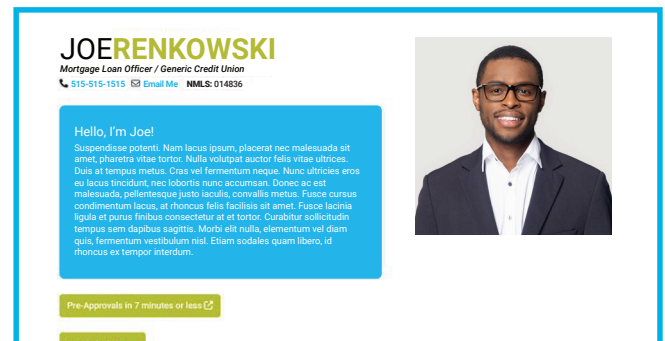
Manage and Grow Your Leads

Combine inbound attraction with outbound hustle to manage your leads and grow your membership. With a user-friendly interface designed to help credit unions drive traffic, convert visitors into leads, nurture those leads into loyal members, and deliver exceptional member support.



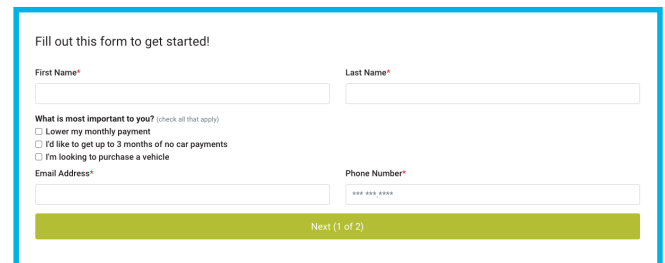
Go Social for Lead Generation

SimplyFocused Microsites are powerful digital marketing and sales tools that empower your team to create focused and unique visitor experiences - creating personal referral/lead generation webpages for each staff member. Developed to improve the visibility of your marketing campaigns and support sales initiatives, product launches, and community events.



Elevate the Member Experience

How effectively does your credit union staff interact with members who perform a large percentage of interactions digitally? SimplyFocused helps route member issues to the right expert quickly and automatically. The front-end form allows members to simply navigate to the topic best suiting their needs and SimplyFocused routes the requests directly to your team for prompt resolution.



Take Action with Analytics

You can't manage what you don't measure. You can't measure what you don't see. Use **Insights and Dashboards** to establish your criteria for converting leads into desired outcomes. Track and measure what's happening real-time across various departments. Plan for and enforce best practices. Adopt an agile approach to identify small issues before they escalate, connect teams, enhance sales accountability, gain visibility, and drive your critical metrics with actionable insights.



HOW WE HELP

Better Forms

Upwards of 70% of loan applications are abandoned. Those are people who are interested in loans who leave the process before you're even aware they were there. Why? Because forms are clumsy, arduous and difficult. Not with SimplyFocused.

We design a simple form to reduce friction and collect specific data points. 2 screens, 7 clicks, 7 form feels and zero friction. All applications take less than 60 seconds.

How much do you need? \$ 20000

Estimated credit score: Good

Are you looking to refinance or purchase? Refinance / Purchase

Vehicle Information (if vehicle)

Year	2017
Make	Model
Make	Text
Make	Text
Year	20000

Are you a member of Community Choice Credit Union? Yes / No

Phone Number: 555-555-5555

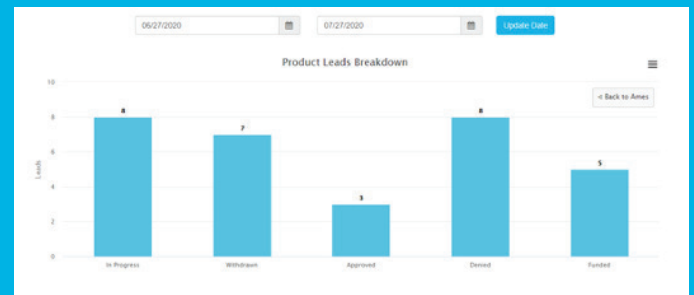
Message/Notes: Text

Submit Application

Better Leads

With a usable, at-a-glance dashboard that sorts all your new leads, the SimplyFocused dashboard puts your sales strategy at your fingertips.

Sort leads by product, assign follow-ups to specific departments and track progress so you know that when your members tell you they want something, you're listening.



Better Insight

See everything you want to know in a single place. When a lead comes in, where it came from and, most importantly, what that member is looking for.

SimplyFocused even provides insight into marketing efforts, tracking ad placements or campaigns and providing daily reports on performance.

Activity
05-19-2020 10:42:04 AM JOE.SHERIDAN@SIMPLYFOCUSED.COM Phone Call - Spoke with Joe. Wants to refinance his car. Call back tomorrow morning.
05-19-2020 10:47:04 AM JOE.SHERIDAN@SIMPLYFOCUSED.COM Status changed to In Progress
05-19-2020 10:18:22 AM JOE.SHERIDAN@SIMPLYFOCUSED.COM Assigned to Joe Sheridan
05-19-2020 10:14:11 AM CCLUWEBAPI@SIMPLYFOCUSED.COM Status changed to Unassigned
05-19-2020 10:14:10 AM CCLUWEBAPI@SIMPLYFOCUSED.COM Created

Better Teams

Get employee buy-in and create a sales culture by allowing your employees to showcase their credit union pride on custom micro-sites that drive value to themselves and the credit union.

Sales is member services and SimplyFocused acts as a white-glove concierge.

ENAAJDIMOVSKI
Account Executive - Community Choice Credit Union
510-208-1142 | 531 East 13th | MSLB 170274

Hello, I'm Ena!

Each month I watch over our products and help our members find the right loan for their needs. And I love to help our members get the most out of their loans. And knowing I'll be able to help you get the most out of your loan, I want to know what you're looking for. Let me know what you're looking for. I'll be able to help you get the most out of your loan. I'll be able to help you get the most out of your loan. I'll be able to help you get the most out of your loan.

Looking for a loan?

Start here by clicking the product below that best describes what you are looking for:

- Auto
- Credit Card
- Mortgage
- Home Eq
- HomeBnk
- LifeInv
- Anything
- CU Process

Community Choice

SimplyFocused is more than a solution to the problems you didn't realize you had or the answer to the questions you weren't asking. **SimplyFocused is your partner in growth, service, creativity and results.**

SIMPLYFOCUSED™
www.simplyfocused.com