



CLICK **RSVP**

RESULTS IN ACTION

Email Marketing and Response Automation
for the Financial Industry

DETAILS THAT MAKE A DIFFERENCE

Building a bridge to reach your customers electronically? It's important to **pay attention to details**. A miscalculation here and there, or using the wrong material can have lasting consequences.

Why? Because if your customer opts-out of receiving your emails – you lose that privilege and that access. It happens, so it's important to control the factors that can lead to customers saying "No thanks" – or worse...

On the other hand, having reliable customer email access instantly benefits both sides.

Timely information, actionable format, environmentally responsible delivery – these are all reasons customers actually welcome emails from their financial provider. In fact, our clients enjoy a **98% email retention rate**.

RELIABLE REACH What good is any platform if it's not reliable? For email, **maximizing delivery** to the inbox is the measure of success. Without the right structure in place, your messages can end up in junk folders ... or not delivered at all.

LET'S CONNECT How do you **connect with customers?** Unless you know their preferences, interests and potential, are you really connecting? Like a bridge, email communication runs in two directions. Enrich and engage with meaningful content that uses **dynamic personalization**, event-triggered messages, polls and surveys.

EXTEND your email program with data integration that links your systems to a powerful delivery and tracking platform. Deploy our **One2One Messaging** that empowers your **front-line** and **business development** teams to connect with their contacts and new customers – all within a secure, centralized environment that ensures brand and compliance consistency.

SUPPORT Email marketing can be complex, especially for financial institutions. That's why you need a reliable support system. Best practices, **knowledgeable experts**, and a dedicated team are all part of the ClickRSVP client experience.



READY FOR EMAIL? With thousands of financial email campaigns behind us, we offer more than a leap of faith. We'll get you safely to the other side – **guaranteed**.



The staff at ClickRSVP has provided valuable expertise with every aspect of our email marketing program. They understand our needs and provide excellent service and support.

– **Clint McCabe**, Director of Marketing, Clear Mountain Bank

WHAT YOU NEED ... WHEN YOU NEED IT.

Most email program offerings are pretty standard: a few templates, some basic list tools and various reports to get you started. But to make email a strategic channel, you'll need specific expertise and a platform that grows with you. We offer a full range of solutions to meet both your immediate and larger goals – from full-service to self-service, and that great place in between: **collaboration**. That's where you take on the tasks that best suit your resources, and we handle the rest, professionally and effectively.

This means you don't have to settle for a third-party "budget platform" that you'll quickly outgrow. Or invest in a costly complex system that could take too long to implement. Plus, EmailConductor plays well with others. We won't try to replace your existing agency or marketing resources. We become part of your team. And when you're ready for system integration, we have the technical resources and experience to help you get there. It all adds up to peace of mind, now ... and later.



SECURITY & COMPLIANCE

For sensitive financial customer data, SAS-70 Type 2 hosting is not only the gold standard, it's a requirement. That's why clients love our ability to meet their internal and regulatory compliance standards, including data security and service level agreements. Since we own our software, there are no worries about working with third or fourth party vendors.



We also ensure that your program stays compliant with CAN-SPAM and industry best practices with some outstanding list management tools like:

- ✓ robust, granular unsubscribe process
- ✓ fail-safe opt-out suppression
- ✓ automatic duplicate email removal
- ✓ user audit trails, and more ...

... all from a trusted, centralized data repository optimized to manage your email data.

POLLS & SURVEYS

Find out what resonates with your audiences. Use email to encourage feedback and gain insight on products, services and communications. We offer two great tools to help you learn more and market smarter. Both solutions can be easily deployed via EmailConductor, and reside on your website.

SurveyRSVP? A full-fledged survey platform designed for customer satisfaction, product usage and other multi-question surveys. Includes a full complement of data collection tools plus great reporting.

POLL Conductor How do your customers feel about a specific issue? Try a poll. Ideal for hot topics and includes instant feedback results. A great way to engage your audience – and learn something in the process.



ClickRSVP has more than exceeded our expectations! No matter what we ask, from our eNewsletter, scam alerts, surveys, and now frequent special eBlasts, they get the job done very quickly and professionally. The customer service is exceptional. They have provided such valuable assistance, thus making my job so much easier.

– Madlyn Gulan, Marketing Specialist, Citizens Financial Bank

GO TEAM, GO!

The personal nature of email makes it a natural choice for one-to-one messages from your customer-facing staff. Business development and loan officers will love **EmailConductor One2One** that allows them to send both ad hoc personal messages, as well as template-based communications. CSR's can follow up with new accounts. EmailConductor makes it easy to empower your team and leverage your program, while effectively managing list access, branding, compliance and mail frequency standards.

BEYOND THE BASICS

Maximizing email's effectiveness for your financial institution requires tools and techniques that go beyond "budget" platforms designed for small businesses.

- ✓ Multi-user, role based access
- ✓ Supports "matrix-mail" and onboarding programs
- ✓ Triggered and sequenced mailings with dynamic content
- ✓ Sales automation features including Prospect Alerts and auto-dynamic responses
- ✓ Secure connectivity with internal applications (SAS-70, Type 2)

SAVE TIME AND MONEY

Building – and sustaining – a successful email program takes expertise, as well as top-notch resources. ClickRSVP has been a leader in financial email since 1999. The result: hundreds of financial clients, thousands of campaigns, and millions of messages. You simply won't find a more qualified partner to help you maximize your program.

- ✓ Complimentary professional needs analysis
- ✓ Flexible programs that change with your needs and resources. Full-service when you need it ... "co-pilot" assistance ... expert support at all times, and self-service are part of our offerings.
- ✓ Benefit from your peers. We bring a proven best-practice, best-results approach based on years of specific experience with thousands of financial campaigns.

Bottom line: you get on the right track quickly and effectively, saving you time and money.

Learn more with a personalized
Demo and Needs Analysis.
Call 877-807-2027
or visit www.clickrsvp.com.

ClickRSVP provides exceptional support for our organization. The representatives are always friendly, efficient, and response time is great. ClickRSVP provides excellent resources and has been happy to work with the credit union to ensure our individual needs are being met and to brainstorm on new and innovative approaches to electronic marketing.

– **Kristen Carreiro**, Marketing Coordinator, First Citizens' Federal Credit Union

FEATURE CHECKLIST



Evaluating vendors for your program? EmailConductor provides all the features found in most email platforms, plus a rich list of advanced, custom components designed for the needs of financial institutions and their marketing partners.

Which features are right for you? Give us your wish-list – we probably have what you need, and then some! Here's just a partial listing ...

List Management Unlimited sub-lists without duplicates • Import, update & synchronize data from Excel and text files • 25 subscriber profile fields • Save & re-use import field mappings • Assign imports to one or more sub-lists • Auto-generate welcome messages • Auto-suppress opt-outs • Flag bad addresses • Full audit trail of import process • Assign lists to different team members • Easily export lists and sub-lists to Excel

Templates & Tools Robust, easy-to-use HTML editor • Import from Word and other editors • Spell-check • Save / re-use multiple templates and graphics in private library • Free access to integrated library with hundreds of quality images • Create and re-use content blocks to ensure consistency and save time • "Mail-merge" content directly from your data • Forward-to-Friend and mobile-friendly version

Campaign Management Supports one-off previews and multiple test groups • Create sub-campaigns to consolidate and isolate results • Optional "safety net" send / approval process • Schedule release for specific date and hour • Auto-schedule recurring campaigns • ROI Calculator • Suppress recent campaign recipients • Fine-tune messages based on past subscriber activity

List Segmentation A/B testing • On-the-fly List Builder • Combine multiple lists for merge and/or suppression • Use profile fields, subscriber activity and dynamic content to personalize and customize messages

Automation Features Robust auto-responder with rules-based processing of trigger events (clicks, sign-ups) • Real-time Prospect Alert notifications to sales and customer-service teams • Auto-delivery of messages based on profile fields (birthdays, rate preferences, etc.) • Automatically display selected email content on web site • Multiple web sign-up forms with dedicated auto-response and Prospect Alerts

Reporting Real-time reports on views, clicks and ROI • Drill-down to specific subscribers and links • Dozens of built-in reports ready for analysis and export • Share most reports with colleagues directly from EmailConductor • Advanced graphical reporting engine for custom reporting

Integration & Team Functions Multi-user access with role-based limits on lists and functionality • One2One Messenger allows use of templates plus personalized content • Connect internal applications (core, MCIF, etc.) to EmailConductor to automate subscribers, opt-outs and other communications.

Premium Delivery Send from one or more of your own email addresses (e.g. *marketing@yourbank.com*) • Enjoy premium delivery with our white-listed and SenderScore Certified® servers • Auto-processing of spam complaints and ISP issues • Deep-dive bounce analysis to remedy delivery issues



ClickRSVP's focus on providing email solutions specifically for financial institutions and their knowledge of compliance regulations/anti-spam laws were both key factors in our decision to choose them as our vendor. Their expertise and user-friendly tools have been instrumental in the success of our campaigns. In addition, their ongoing support and quick response to questions has greatly simplified the processes involved in developing and growing our email marketing program!

– Sue Stricklin, Vice President, Marketing, Home Savings

WHAT CAN WE DO FOR YOU?

Citizens BANK
eNews

Wish You Were Here?

You're closer than you think.

Whether you are planning a beach vacation or trying to see family in Rhode Island, we have a lot for you to save money. A Convenience Check conveniently gives you access to a FREE 24-hour service agent and discounted gas cards. A Gas agent will also call during regular business hours, receive your rewards (gas, hotels, rental cars, movies, theme park tickets, cruise car, etc.) and provide you with a selection of the lowest cost options available. The travel professional will also tell you about discounts and rates. We hope you enjoy the savings offered on this "Travel Edition." Please feel free to forward it ahead to other members who you feel would like the information, as a Convenience Check membership can be easily added to any Citizens Checking account. For more information on how to save money wherever you are or stop into any Citizens Banking Center. Any questions, please call our Customer Service Department at 1-800-228-2222.

COMMUNITY RESOURCE
eNews

June 2009

FEATURE ARTICLE

4.99% APR* New Auto Rates!

Today's Top Rates

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- 2.99% New Home Loans (on 30-year term)
- 4.99% CD Rates (on 12-month term)

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Metro@work News

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It's time to refinance your mortgage or buy a new home with mortgage rates at historic lows.

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BANKING YOUR BUSINESS

Business Solutions Seminars

How can you build your business online? You're invited to find out.

Join us for a free seminar: **Using Internet Marketing to Build Your Business**

How can you build a business online more cost-effectively and profitably? The answer is at our fingertips — the Internet. Today, the most successful businesses are utilizing integrated internet marketing programs that help them build traffic, generate leads, and maximize sales opportunities.

Using Internet Marketing to Build Your Business

with Louise Rios of **Advanced Media Productions**

Thursday, June 18th, 2009
7:30 am
Citizens Plaza Hotel
1000 Washington Street
Rte 1, Hudson, MA

So how can your business tap into this opportunity?

Middlesex Savings Bank invites you to join Louise Rios, Vice President of Marketing and Sales for Advanced Media Productions, a successful Massachusetts internet marketing and lead generation company, for a free presentation on how internet marketing can build your business.

Topics presented include:

- The benefits of internet marketing
- The key factors for building successful websites
- How to utilize affiliate marketing to generate traffic
- How to create an effective internet marketing plan

Don't miss this opportunity! Register by June 11, 2009.

Visit www.middlesexbank.com/BusinessSolutions or just call Middlesex Savings Bank at 1-877-463-6337.

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What are you referring?
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Fill out this form and give it to a friend. If your friend opens a new account, we'll mail you a \$10 restaurant gift certificate!

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Your monthly statement isn't worth the paper it's printed on. Go green with paperless eStatements and save.

Paper statements are no longer the best way to view monthly account activity. They take valuable natural resources and create unnecessary clutter. So wonder away and more folks are switching to eStatements.

- eStatements save paper
- eStatements save time
- eStatements save clutter

With no paper wasted on the printing of statements or the need to store, organize, eStatements are added to our computer and sent from where we account. You are up to date, always, and on time.

No commitment! Here are some reasons for consideration:

- eStatements are free
- eStatements include cancelled checks
- eStatements can be watched back easily
- eStatements are secure
- eStatements are available sooner

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CLICKRSVP
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