

Leveraging Data to Optimize Marketing Spend and Boost ROI

California Coast Credit Union (Cal Coast), a leading \$3.4 billion credit union operating throughout California, successfully harnessed the power of data to optimize its marketing efforts and reduce costs. By partnering with Trellance, Cal Coast was able to implement a data-driven approach that delivered significant benefits for both its members and the industry.

THE CHALLENGE:

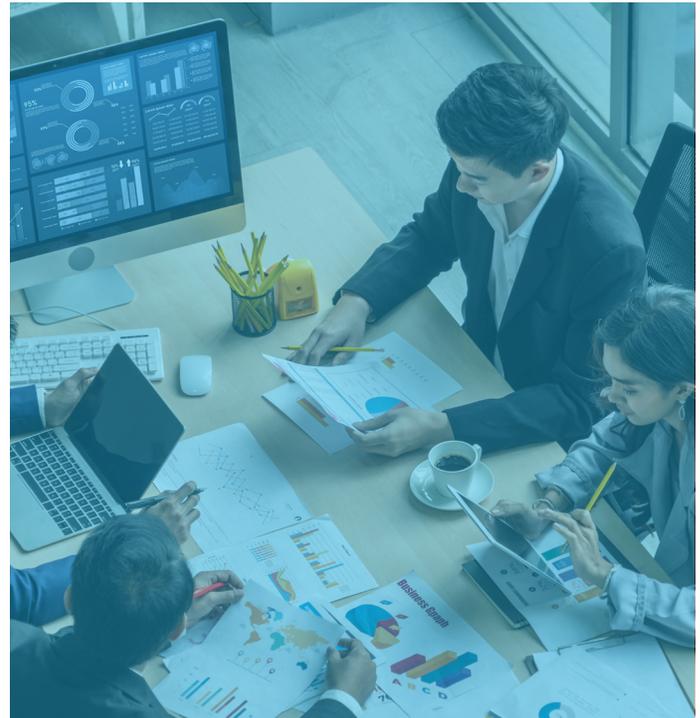
Cal Coast, with its extensive member base of over 220,000 individuals and diverse product offerings, faced the challenge of allocating marketing budgets effectively. Traditional marketing methods often lacked the precision and accountability needed to maximize ROI.

A DATA DRIVE:

Future Forward Digital Transformation

To address these challenges, Cal Coast turned to Trellance's Data Warehouse and Data Lake solutions. By centralizing and analyzing vast amounts of member and third-party data, Cal Coast was better able to gain invaluable insights into real time member behavior, preferences and better understand the impact of digital marketing campaigns and partnerships by channel, segment and geography.

A key component of this transformation was the development of a custom marketing dashboard that allowed Cal Coast to evaluate the effectiveness of marketing initiatives across various channels, allocate resources efficiently to maximize ROI and tailor marketing campaigns to meet with individual needs.



“This is certainly my favorite and most data progressive project I have been working on, continuing to get new data incorporated into these types of holistic views will be extremely powerful for Cal Coast.”

Kevin Dawson,
Digital Marketing Director at Cal Coast

California Coast
Credit Union

SAN DIEGO, CA

220K

members

\$3.4B

in assets

A DATA-DRIVEN SUCCESS STORY:

Increase ROI, Member Growth and Lead Conversion

By leveraging data-driven insights through Trellance's dashboards and reporting solutions, Cal Coast was able to achieve significant results and significantly reduce marketing spend on campaigns, boost return on investment by 30%, generate higher-quality leads and subsequent number of approved members applications and drive growth overall membership growth for the year.

By leveraging weighted calculations for marketing spend per product alongside growth metrics across branches and channels, Cal Coast can measure the relative cost of marketing campaigns on physical and digital channel penetration as well as being able to target segment by client or location.



A REAL-WORLD EXAMPLE:

MLB Partnership

Cal Coast's partnership with a major league baseball team provides a compelling example of the power of data-driven marketing. By tracking fan engagement through a "scan and chat" QR code delivered digitally across streaming devices in-game, the credit union was able to optimize marketing campaigns and drive sports fan engagement that amounted to over 1,500 chats per game throughout the entire season.



THE FUTURE OF DATA-DRIVEN MARKETING:

What's Next for Cal Coast

Cal Coast remains committed to leveraging data to drive innovation and deliver exceptional value to its members. By continuing to invest in innovative technology and data analytics, the credit union can deliver personalized, relevant experiences, drive long-term growth and profitability through highly optimized reports and dashboards, and utilize the power of data to gain a competitive edge in a rapidly changing digital economy and credit union landscape.

About Rise Analytics Rise Analytics empowers credit unions with cutting-edge analytics, AI and machine learning to turn data into actionable strategies. With deep industry expertise and innovative data solutions, Rise Analytics helps credit unions make smarter decisions, drive meaningful outcomes and achieve long-term success. Their powerful combination of technology and advisory services ensures every insight leads to impact. Learn more at RiseAnalytics.com.

