

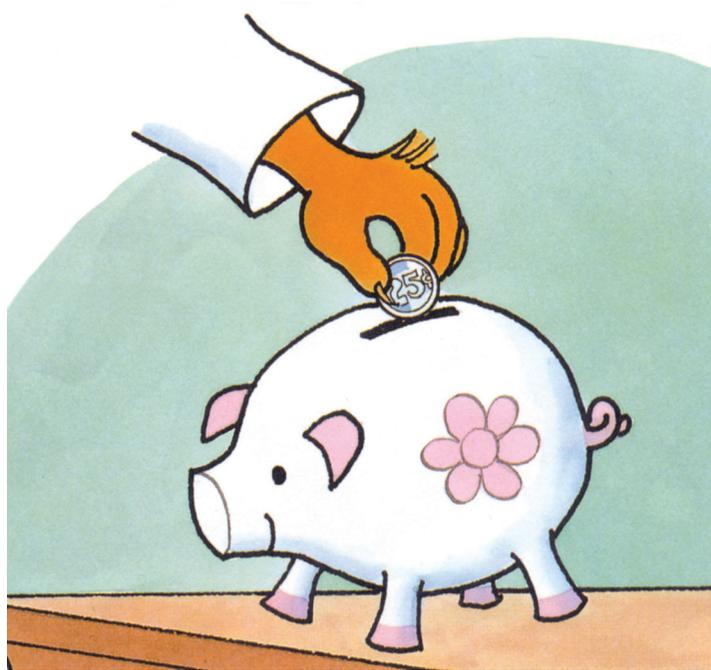
The Berenstain Bears[®]
Financial Literacy Program

SAMPLE MARKETING PLAN

© CREDIT UNION NETWORK FOR FINANCIAL LITERACY



Credit Union Network
for Financial Literacy



This sample marketing plan, provided by Credit Union Network for Financial Literacy (CUNFL), is designed to guide credit union marketing professionals in effectively promoting **The Berenstain Bears Cub Account** and the associated Cub Club initiative.

As financial literacy becomes increasingly important for young savers, the Cub Account offers a unique opportunity to engage families and foster a love for saving through fun, educational resources and the well-known The Berenstain Bears brand. This plan outlines a variety of strategies and tactics that credit unions can adopt or adapt to suit their specific needs and objectives. Whether you choose to implement one or several of these ideas, our goal is to empower your credit union to successfully market the Cub Club and inspire the next generation of financially savvy individuals.

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Objectives:

Promote **The Berenstain Bears Cub Account**, a savings account designed for children, as part of the **Berenstain Bears Financial Literacy Program**. The goal is to encourage parents to open savings accounts for their children and educate young members on the importance of financial literacy from an early age.

Target Audience:

- **Parents with young children:** Primarily ages 3-11, focusing on families interested in teaching financial literacy.
- **Grandparents and relatives:** Encourage gift-giving through savings accounts for young family members.
- **Credit Union Members:** Promote the Cub Account and joining the Cub Club as an opportunity for families to secure their children's financial future.

Q1: January - March

GOALS: Build awareness and drive account sign-ups through educational outreach and promotions

1. New Year, New Habits Campaign

- **Focus:** Encourage families to prioritize saving habits in the New Year.
- **Tactics:**
 - Launch a [digital campaign](#) with the call to action, “[Join the Cub Club!](#),” showcasing the [Cub Account](#), emphasizing incentives: [\\$10 first deposit match](#), [\\$10 birthday month deposit](#), and a [free copy of The Berenstain Bears Visit the Credit Union](#).
 - Promote a webinar series for parents on teaching kids financial literacy.
 - Send credit union representatives to local schools to read the [Berenstain Bears book](#) and present CUNFL lessons on [Save, Share, Spend, Earn](#), encouraging students to [Save](#).

2. In-Branch Promotions:

- **Tactics:**
 - Use branch screens, posters, and brochures featuring “[Join the Cub Club](#)” to promote the [Cub Account incentives](#) and the school visits where educators present the Berenstain Bears lessons.

3. School Partnership:

- **Focus:** Build relationships with schools through financial literacy programs.
- **Tactics:**
 - Credit Union educators will visit schools to conduct [Berenstain Bears-themed lessons](#) on [Save, Share, Spend, and Earn](#) and distribute [Cub Account information](#) and [free books](#), inviting students to “[Join the Cub Club](#).”



Q2: April - June

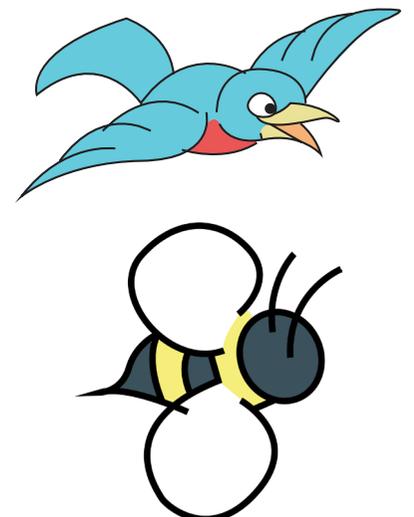
GOALS: Engage families through school events and community outreach.

1. Spring into Savings Campaign

- **Focus:** Encourage saving for future goals, especially summer activities
- **Tactics:**
 - Promote the [\\$10 matching first deposit](#), [birthday deposit](#), and [free book](#) for new account holders, encouraging them to “[Join the Cub Club.](#)”
 - Continue [school visits](#) by credit union educators, reinforcing saving habits and promoting the [Cub Account](#) during Financial Literacy Month (April).

2. Children’s Book Month (April)

- **Focus:** Promote the educational aspect of financial literacy
- **Tactics:**
 - Celebrate [Children’s Book Week](#) by offering the [free Berenstain Bears](#) book to every new Cub Account opener, inviting them to “[Join the Cub Club.](#)”
 - Include an educational segment where educators read the book in classrooms and at local libraries, tying into the [Save, Share, Spend, Earn](#) lessons and encouraging kids to “[Join the Cub Club.](#)”



Q3: July - September

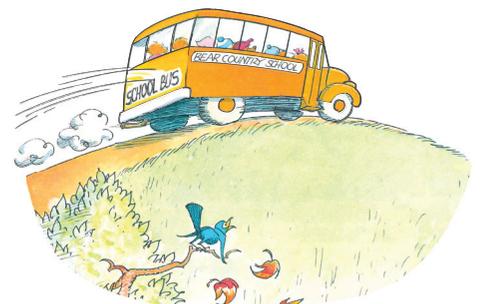
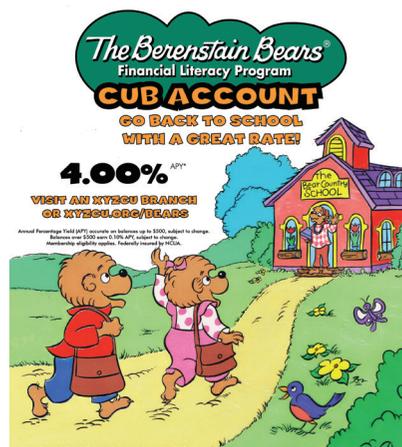
GOALS: Leverage back-to-school season to promote saving and financial literacy.

1. Back-to-School Savings Campaign

- **Focus:** Position the Cub Account as an ideal savings tool for back-to-school needs.
- **Tactics:**
 - Continue school-based financial literacy sessions as the school year begins, with educators visiting classrooms to conduct [Berenstain Bears-themed lessons](#), urging students to ["Join the Cub Club."](#)
 - Promote the [\\$10 birthday month deposit](#) to help students save for upcoming school expenses.
 - Use back-to-school marketing materials to advertise the Cub Account incentives and invite families to ["Join the Cub Club."](#)

2. Community Event Sponsorship

- **Tactics:**
 - Attend local fairs and back-to-school events, setting up booths where educators provide mini-lessons on [Save, Share, Spend, Earn](#) and offer information on opening a Cub Account, encouraging families to ["Join the Cub Club."](#)



Q4: October - December

GOALS: Capitalize on the holiday season to encourage savings and gift-giving.

1. Holiday Gift Campaign

- **Focus:** Promote the Cub Account as a thoughtful holiday gift for children
- **Tactics:**
 - Run a campaign offering **\$10 deposit matches** and a **free book** as part of a holiday gift package for kids, inviting them to **"Join the Cub Club."**
 - Encourage schools to invite credit union educators for classroom visits to read the Berenstain Bears book and teach students about financial literacy, urging them to **"Join the Cub Club."**
 - Use in-branch promotions and email marketing to highlight the benefits of starting a Cub Account during the holiday season.



Ongoing Initiatives Throughout the Year

1. School Visits & Educator-Led Lessons

• **Tactics:**

- Credit union educators will conduct ongoing school visits, reading [The Berenstain Bears Visit the Credit Union](#) and presenting lessons on [Save, Share, Spend, Earn](#), consistently encouraging students to “[Join the Cub Club](#).”
- [Donate](#) The Berenstain Bears Visit the Credit Union and lesson plans to teachers. Teachers can present the lessons if you are unable to visit schools.
- Partner with schools to host financial literacy days, featuring the Cub Account and its matching deposits as practical ways for students to start saving, with the tagline “[Join the Cub Club](#)” and [Save, Share, Spend, Earn](#).

2. Digital & Social Media Marketing

• **Tactics:**

- Share social media content showing educators reading to students and conducting financial literacy lessons, with the message “[Join the Cub Club!](#)” prominently featured.
- Highlight the [matching deposit offers](#) and other benefits of the Cub Account in blog posts, email newsletters, and social media campaigns, using “[Join the Cub Club](#)” as the central call to action.



Metrics for Success

- **School Engagement:** Track the number of school visits and educator-led lessons conducted, with a focus on how many students are invited to “Join the Cub Club.”
- **New Account Sign-Ups:** Measure the number of new Cub Accounts opened as a result of school outreach and campaigns featuring the “Join the Cub Club” messaging.
- **Member Satisfaction:** Gather feedback from parents and educators on the effectiveness of the financial literacy sessions and promotional incentives tied to “Join the Cub Club.”

Here's a suggested budget breakdown percentage for the marketing plan promoting The Berenstain Bears Cub Account and the Cub Club:

Sample Budget Breakdown Percentage

Category	Description	Percentage of Total Budget
Digital Marketing	Online ads, social media campaigns, and email marketing to promote the Cub Account and drive engagement.	25%
Print Marketing	Posters, brochures, and flyers for in-branch promotions and school visits.	15%
School Outreach Programs	Costs associated with educator visits, materials for classroom lessons, and distribution of books.	20%
Community Events	Sponsorships and participation fees for local fairs and back-to-school events.	15%
Webinars & Workshops	Development and promotion of educational webinars for parents and families.	10%
Promotional Incentives	Budget for matching deposits and other promotional giveaways associated with the Cub Account.	10%
Monitoring & Evaluation	Costs related to measuring the success of campaigns and gathering feedback.	5%

Total Budget Allocation: 100%

This budget breakdown provides an overview of how resources can be allocated across various marketing strategies and initiatives, ensuring a balanced approach to promoting the Cub Account and engaging the community effectively. Adjustments can be made based on specific needs and priorities of the credit union. Your credit union determines the total amount spent.

