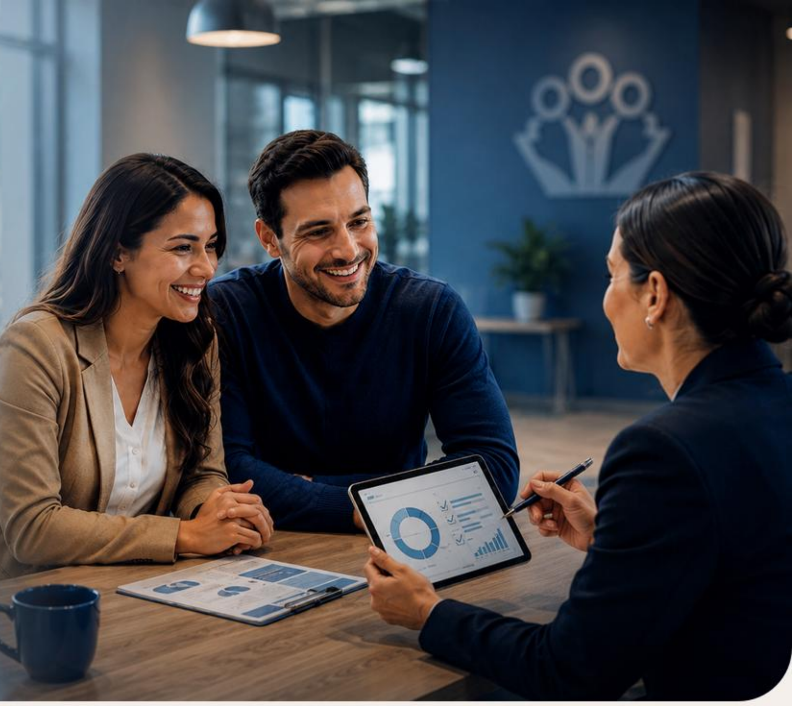
PULSE
BY GREENBERG ENTERPRISES

FINANCIAL SERVICES | CREDIT UNION

Record-Breaking Member Acquisition for a Regional Credit Union

Objective: Drive lower-funnel loan conversions across auto and home mortgage via omnichannel activation and closed-loop attribution



250+
Conversions in 45 Days

$22MM+
Pipeline to Close

Record
Largest Month in History

100%
Closed-Loop Attribution

The Challenge

A regional credit union was running digital media across META, Google, and programmatic channels for two active loan products: automotive and home mortgage. Despite the investment, lower-funnel conversion activity was nearly zero. No attribution framework connected spend to real member actions. Audiences were too broad, impressions were wasted outside the service area, and there was no way to identify who was actually in-market.

The Solution

PULSE built a full-funnel omnichannel strategy across five channels, targeting verified in-market members within the credit union's footprint.

- Separate campaigns for auto loans and home mortgage, each with dedicated audience sets and KPIs
- Deterministic third-party audience targeting to reach active in-market members only
- Precision geo-targeting to eliminate wasted impressions outside the service area
- Omnichannel activation across META, Display, OLV, CTV, and Retargeting
- Closed-loop attribution implemented for the first time, connecting every ad exposure to a real conversion event
- Continuous optimization across all five channels to scale qualified volume at efficient cost

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The Results

In 45 days, this campaign delivered the largest recorded month in the organization's history. The inbound call volume became so high that the marketing team was asked to pause outbound efforts while operations caught up.

- 250+ lower-funnel conversions generated in 45 days, more than all prior digital efforts combined
- $22MM+ pipeline in active development moving toward close across both loan products
- Record month for member acquisition: the highest conversion volume the credit union has ever recorded
- Inbound call group overwhelmed with qualified inquiries, requiring a pause on additional marketing activity
- Five channels working together delivered a high-quality audience that, with consistent nurturing across META,
- Display, OLV, CTV, and Retargeting, converted at scale
- Complete attribution visibility for the first time: every dollar tied to a real member action

Opening this credit union across five channels built an audience quality that conventional single-platform approaches never could. 250+ conversions and a $22MM pipeline in 45 days is what omnichannel done right looks like.

The Impact

This was not just a strong campaign. It was proof that running across META, Display, OLV, CTV, and Retargeting together builds a caliber of audience quality that produces real business outcomes at scale. The credit union now has a repeatable acquisition model, a $22MM pipeline moving to close, and an inbound volume problem: the best kind.

Key Takeaways

- Two simultaneous loan campaigns, auto and home mortgage, both converted. Channel separation by product and KPI was essential.
- Omnichannel reach across all five channels is what generated the audience quality needed to produce 250+ conversions. No single platform could have done this alone.
- Retargeting nurtured the in-market audience built through prospecting on META, Display, OLV, and CTV into actual conversions.
- Closed-loop attribution connected every conversion to a specific exposure, giving the credit union a true picture of what was working.
- A $22MM pipeline and an overwhelmed inbound call team are the downstream result of getting precision right from the start.

Ready to Get Started?

Contact Now

info@greenbergenterprises.com