

6.4 Monthly Report Examples



Key Metrics for Participation: Q2 2024

New Member Growth

2024 Goal	YTD Goal	YTD Actual
6,400	3,083	2,711

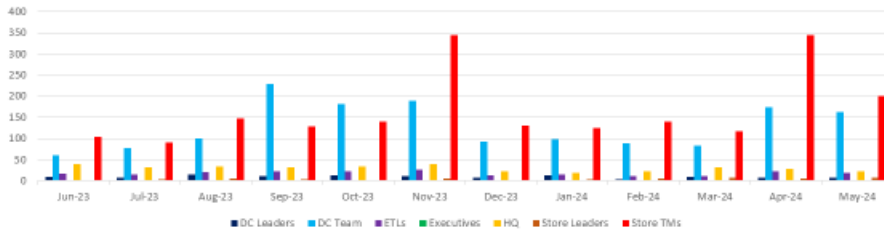
Total Target Mem:	49,131
Matched TM:	19,378
Overall Participation:	4.50%
YTD Div Paid:	\$2.49M

Total Value to Target

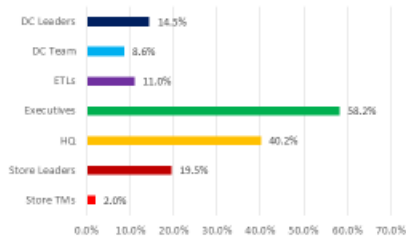
\$6.60M

Based on average TCU member savings of **\$341** per year over national banks.

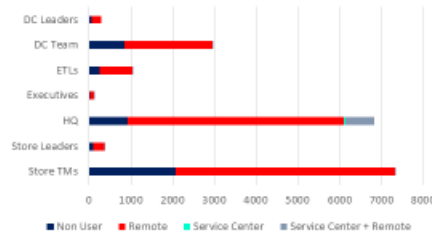
New Member Trending by Segment



Participation % by Segment



Segment Access Points



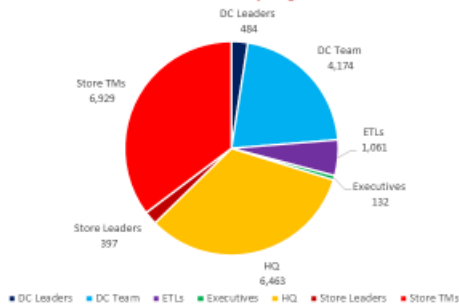
TGT Savings by Product



Key Metrics for Participation: Q2 2024

- Key Success:**
- DC leader growth
- Key Challenge:**
- HQ population growth more stagnant

Total Members by Segment



2024 Key Initiatives

Communication	Audience	Suggested Channel	Timing
Well-being Expo campaign	All TMs	Virtual - Allight portal	February
Financial Workshops	Nationwide	Stack promotion, cross promote w/ groups	Ongoing
April Mini Companywide Campaign	All TMs	Text message, rotating story, poster	April-May
DC Outreach	All DC TMs	Expand onsite visit program	Ongoing
New Hire Landing page and email	20-60k/mo	Blurb in TGT email w/ link to landing page	Ongoing
Partner with Target's ERGs	AABC	Financial Cohort for AABC, workshops	Ongoing
Onsite HQ Engagement	HQ, field leaders	Tables during TT, Demo Day	Ongoing
Golden Valley summer picnic series	Twin Cities Metro	Field comms - similar to G.O.	June, July, Aug
Money Tracks Launch	All TMs	Nationwide "kits", rotating story, text	July
Fall Companywide Campaign	All TMs	Email, poster, rotating story, text	November
Z Min to Membership	All TMs	Enroll TMs in TCU right from HR systems	TBD

Consumer Loan Balance



Total Active Checking



Total Mortgage Balance



Total Share Balance



Target Member Map:
Q2 2024



Member Distribution - Top 5 States		HQ Distribution		
State	Members	HQ Site	Members	Participation
MN	21,689	TNC	666	40.56%
CA	10,391	TGT PLAZA	3520	40.04%
TX	5,730	TEMPE	145	30.79%
GA	4,366			
FL	4,365			
		Total	4331	

Target CU NPS Comments

- *I feel comfortable and valued when I interact with staff.* – Erin O.
- *The services and benefits are significantly better than what I find with your competitors.* – Jason W.
- *Everything is user friendly.* – Emilia G.
- *It was easy!* – James R.
- *Love the online access to inquire about different account options!* – Elisabeth C.
- *Erika at the Credit Union in Golden Valley was very knowledgeable and eager to help me!!* – Steve M.