



*Helping you choose the
most effective branded
merch to 'WOW' your
specific target market*

Your Branded Merch Agency

CREDIT UNION BRANDED MERCH ANNUAL WORKBOOK

If you are looking for a Branded Merch Specialist that understands your industry and is more than just a product broker then give us a call and see how we might be able to work together or feel free to test us out on your next promotion!

250-758-4133

rod@outoftheboxmarketing.ca

www.outoftheboxmarketing.ca

WHY A BRANDED MERCH AGENCY ?

Like an Ad Agency we work with a select group of clients that are purposeful in how they want their brand represented. Instead of recommending all advertising mediums we focus our expertise on helping you choose Branded Merch that will WOW your specific target market, but unlike an Ad Agency we do not charge a fee.

Most Promotional Product companies recommend products first. In contrast we take time to learn about your Company; the purpose of your promotion; who the recipient is; your budget; how the product is going to be distributed and the branding you would like on the product. Then we go to work finding a Branded Merch product that will WOW your specific target market.

The following workbook is meant to show a few ways Branded Merch has helped other Credit Unions achieve their objectives, and act as a planning guide to help organize your plans. I know you are incredibly busy therefore whether you use us for one project or partner with us for your full annual plan please think of us as "Your Own Branded Merch Staff" and true partner from concept to completion while we are working together.

I've had the great pleasure of knowing and working with Rod for over 20 years. While my team works with him more directly these days, we all agree that no matter what idea we've thrown at him, Rod and his team always deliver. The Out of the Box team is friendly, responsive, quick on their feet to provide ideas and options, and are always timely and communicative. We all really appreciate that Rod works to always find the right solution for us and truly understands the values and culture of our organization.

Joe Cristiano, Chief Community & Marketing Officer, Coastal Community Credit Union

I worked with Rod on a number of initiatives to recognize our members and employees. Rod applied his thorough understanding of the market, along with his marketing experience to create custom built programs that met our needs. He focusses on solutions and relationships, not just products. I'd highly recommend Rod and the team at Out of the Box Marketing for your promotion needs.

Mark Jones, CEO, Union Bay Credit Union



PACIFIC CANADA
Nominee



NANAIMO
Business of the year



VANCOUVER ISLAND
Entrepreneur of the year



#137 fastest
growing Company
in Canada!



4th fastest growing
Company in our industry
in North America
(out of 18,000 Companies)

BRANDED MERCH SOLUTIONS FOR CREDIT UNIONS

- ☐ Door prizes
- ☐ Client "Thank you" gifts
- ☐ Promoting brand
- ☐ Outdoor event displays
- ☐ Trade shows
- ☐ Loyalty or incentive program for clients
- ☐ Kids program
- ☐ Team sponsorships (jerseys)

Community Events:

- ☐ Chamber of Commerce
- ☐ Sponsorships
- ☐ Golf events
- ☐ Local Fairs
- ☐ Pride or other parades
- ☐ Fundraiser Walks
- ☐ Kids events or sponsorships

- ☐ Merger or Acquisition (3 step program to promote to stakeholders)
- ☐ Develop online Company store for branded merch
- ☐ Create a storage and fulfillment program
- ☐ 7 step system for prospecting "home run clients" or community influencers
- ☐ Leverage cash sponsorships by adding tangible product to create memorable impact

For more info see:

www.outoftheboxmarketing.ca/wow-your-clients
www.outoftheboxmarketing.ca/wow-your-prospects

STAFF:

- ☐ Create a structured Length of Service program for staff
- ☐ Create Recognition or Incentive voucher program for staff
- ☐ Employee recruitment program.
- ☐ Birthday or anniversary gift program
- ☐ Reward and Recognition program for staff
- ☐ Gift voucher program
- ☐ Branded clothing for staff
- ☐ Gifts for team projects or department recognition
- ☐ Health and Wellness program



For more
info see:

www.outoftheboxmarketing.ca/wow-your-staff

Think of us as “YOUR BRANDED MERCH STAFF”

Most of our clients work with us as their primary Branded Merch partner so we can take the time to learn about their business and then we meet with them at least twice a year to present different program ideas based on our understanding of their goals and objectives. The following are examples of things we might present.

BRANDED MERCH STORE

Branded Merch stores are extremely customizable depending on what your needs are and can range from a Pop up store where we take orders or sizes for a group order of clothing or other products to a fully customized Branded Merch website and anywhere in between. If you decide that you want a Branded Merch website we would work with you to create a complete logistics plan around payment; who is authorized to order; how much inventory we should have; if you want us to do fulfillment; storage and shipping; etc.

FULLFILLMENT, STORAGE AND DISTRIBUTION

We can split ship a certain merch item to all your branches or to all your employees homes or we can store your branded merch inventory and ship out as you need either for specific decision makers or from orders on your Company Store website.

GIFT VOUCHER PROGRAM

We can develop a custom prepaid gift voucher program for either staff or the public that can purchase products on your online store with prepaid gift vouchers and would work with you to set parameters of who is authorized to purchase the vouchers.



DEVELOPING CUSTOM EMPLOYEE LENGTH OF SERVICE PROGRAM

Let us work with you to create a budget and recommend products at various levels of service you would like to recognize for example, 1, 5, 10, 15, 20 years, etc, and also work with you to decide how, when and where to present the awards.



**ASK ABOUT OUR ECO FRIENDLY
AND SUSTAINABLE PRODUCTS**

EXAMPLE OF HOW WE PARTNER WITH OUR CLIENTS

Our client called us to create a Branded Merch solution that would achieve the following:

- celebrate their 75th anniversary
- thank staff for all they did through Covid
- build sense of team after working remotely for a year
- celebrate major milestones achieved during the previous year

We worked with our clients HR and Marketing Dept. to create a custom box with a digital photo frame and custom USB with 20 downloaded photos showing the history of this particular Credit Union.

We shipped these to the offices and homes of 600 staff members within a 3 day period and then all staff had a zoom call from the CEO at a certain time when they all opened their gift together.



DOWNLOADED PHOTOS INCLUDED:

- original branch location
- 50 year old photos of tellers and lines in branches
- evolution of the brand
- numerous sponsorship events over the years

PRESENTATION BOX:

- front cover showed clients branding created out of 600 small photos of each staff member so each person could find their photo on the box.
- sides listed major milestones over the last 75 years
- bottom of box shows personal notes from all the executive
- each box contained a letter from the CEO



**Give us a call to set up a brainstorming session to see if there is
any way we can partner with you to make your life easier!**

Please call us with your Marketing or HR objectives and we would be happy to brainstorm a custom WOW Branded Merch solution for your specific needs.

BRANDED MERCH PLANNING CALENDAR

2023 JANUARY 2023						
SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

DESCRIPTION OF EVENT

RECIPIENT DEMOGRAPHIC

DESIRED OBJECTIVE

HOW TO DISTRIBUTE

QUANTITY

BUDGET PER PIECE

LOGO OR MESSAGING

TOTAL

BRANDED MERCH PLANNING CALENDAR

2023 FEBRUARY 2023						
SUN	MON	TUE	WED	THU	FRI	SAT
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

DESCRIPTION OF EVENT

RECIPIENT DEMOGRAPHIC

DESIRED OBJECTIVE

HOW TO DISTRIBUTE

QUANTITY

BUDGET PER PIECE

LOGO OR MESSAGING

TOTAL

BRANDED MERCH PLANNING CALENDAR

2023 MARCH 2023						
SUN	MON	TUE	WED	THU	FRI	SAT
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

DESCRIPTION OF EVENT

RECIPIENT DEMOGRAPHIC

DESIRED OBJECTIVE

HOW TO DISTRIBUTE

QUANTITY

BUDGET PER PIECE

LOGO OR MESSAGING

TOTAL

BRANDED MERCH PLANNING CALENDAR

2023 APRIL 2023						
SUN	MON	TUE	WED	THU	FRI	SAT
30						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

DESCRIPTION OF EVENT

RECIPIENT DEMOGRAPHIC

DESIRED OBJECTIVE

HOW TO DISTRIBUTE

QUANTITY

BUDGET PER PIECE

LOGO OR MESSAGING

TOTAL

BRANDED MERCH PLANNING CALENDAR

2023MAY2023						
SUN	MON	TUE	WED	THU	FRI	SAT
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

DESCRIPTION OF EVENT

RECIPIENT DEMOGRAPHIC

DESIRED OBJECTIVE

HOW TO DISTRIBUTE

QUANTITY

BUDGET PER PIECE

LOGO OR MESSAGING

TOTAL

BRANDED MERCH PLANNING CALENDAR

2023JUNE2023						
SUN	MON	TUE	WED	THU	FRI	SAT
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

DESCRIPTION OF EVENT

RECIPIENT DEMOGRAPHIC

DESIRED OBJECTIVE

HOW TO DISTRIBUTE

QUANTITY

BUDGET PER PIECE

LOGO OR MESSAGING

TOTAL

BRANDED MERCH PLANNING CALENDAR

2023		JULY					2023
SUN	MON	TUE	WED	THU	FRI	SAT	
30	31					1	
2	3	4	5	6	7	8	
9	10	11	12	13	14	15	
16	17	18	19	20	21	22	
23	24	25	26	27	28	29	

DESCRIPTION OF EVENT

RECIPIENT DEMOGRAPHIC

DESIRED OBJECTIVE

HOW TO DISTRIBUTE

QUANTITY

BUDGET PER PIECE

LOGO OR MESSAGING

TOTAL

BRANDED MERCH PLANNING CALENDAR

2023		AUGUST					2023
SUN	MON	TUE	WED	THU	FRI	SAT	
		1	2	3	4	5	
6	7	8	9	10	11	12	
13	14	15	16	17	18	19	
20	21	22	23	24	25	26	
27	28	29	30	31			

DESCRIPTION OF EVENT

RECIPIENT DEMOGRAPHIC

DESIRED OBJECTIVE

HOW TO DISTRIBUTE

QUANTITY

BUDGET PER PIECE

LOGO OR MESSAGING

TOTAL

BRANDED MERCH PLANNING CALENDAR

2023		SEPTEMBER					2023
SUN	MON	TUE	WED	THU	FRI	SAT	
					1	2	
3	4	5	6	7	8	9	
10	11	12	13	14	15	16	
17	18	19	20	21	22	23	
24	25	26	27	28	29	30	

DESCRIPTION OF EVENT

RECIPIENT DEMOGRAPHIC

DESIRED OBJECTIVE

HOW TO DISTRIBUTE

QUANTITY

BUDGET PER PIECE

LOGO OR MESSAGING

TOTAL

BRANDED MERCH PLANNING CALENDAR

2023		OCTOBER					2023
SUN	MON	TUE	WED	THU	FRI	SAT	
1	2	3	4	5	6	7	
8	9	10	11	12	13	14	
15	16	17	18	19	20	21	
22	23	24	25	26	27	28	
29	30	31					

DESCRIPTION OF EVENT

RECIPIENT DEMOGRAPHIC

DESIRED OBJECTIVE

HOW TO DISTRIBUTE

QUANTITY

BUDGET PER PIECE

LOGO OR MESSAGING

TOTAL

BRANDED MERCH PLANNING CALENDAR

2023		NOVEMBER					2023
SUN	MON	TUE	WED	THU	FRI	SAT	
			1	2	3	4	
5	6	7	8	9	10	11	
12	13	14	15	16	17	18	
19	20	21	22	23	24	25	
26	27	28	29	30			

DESCRIPTION OF EVENT

RECIPIENT DEMOGRAPHIC

DESIRED OBJECTIVE

HOW TO DISTRIBUTE

QUANTITY

BUDGET PER PIECE

LOGO OR MESSAGING

TOTAL

BRANDED MERCH PLANNING CALENDAR

2023		DECEMBER					2023
SUN	MON	TUE	WED	THU	FRI	SAT	
31					1	2	
3	4	5	6	7	8	9	
10	11	12	13	14	15	16	
17	18	19	20	21	22	23	
24	25	26	27	28	29	30	

DESCRIPTION OF EVENT

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TOTAL

SUMMARY OF ANNUAL BRANDED MERCH NEEDS

Call or email Out of the Box to come up with a WOW Branded Merch Product for the following

EVENT	EVENT OR PROMOTION	TARGET	APPROX
DATE	DESCRIPTION	MARKET	QTY. BUDGET
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Some promotions require specific products for specific events but most Credit Unions also have their favourite “go to products” such as pens, t-shirts, mugs or a signature product that they have become known for that are used for various objectives such as branding, door prizes and events that occur throughout the year.

PRODUCT	QUANTITY	BUDGET	PURPOSES USED FOR
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

CONTACT US TO LEARN MORE ABOUT OUR CUSTOM FULFILLMENT AND DISTRIBUTION SOLUTIONS

OUT OF THE
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MARKETING
SOLUTIONS

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Think of us as
Your Branded Merch Staff



What would you ask if we were at the desk next to you?

Who can we help you 'WOW' today?

250-758-4133

rod@outoftheboxmarketing.ca