

| Automate Smarter, Execute Faster & Engage Deeper

NOOK CAPABILITIES



nook-inc.com

What we do

Through AI-driven automation, data intelligence, and expert marketing execution, we make it easier, faster, and more efficient for credit unions and financial services organizations to connect with their communities.



**Nook is a Credit Union Service Organization (CUSO)
and Platinum HubSpot Solutions Partner.**

Our products and services:



**HubSpot Sales,
Implementation
& Optimization**



**Customized
Marketing
Strategy &
Execution**



**Core to
HubSpot Data
Connector**



**Niche
Experience
Platform for
Credit Unions**

Powered by HubSpot



HubSpot sales, implementation & optimization

- **MarTech Stack Audit:** Solve your data and process problems.
- **Planning & Implementation:** Scope, implement and deploy your new tech tools.
- **HubSpot Migration:** Migrate from your current CRM without business disruption.
- **Education & Training:** Help your team get the most from HubSpot and drive ROI.
- **Operations:** Automate and optimize your sales and marketing processes.
- **Custom Integrations & Applications:** Connect HubSpot with third-party software & applications fulfilling your business needs.
- **Industry Expertise:** Access a team with deep credit union expertise who understands your business.



Customized marketing strategy & execution

- **Strategic Priority Alignment:** Align marketing strategies with business goals and leadership objectives.
- **Full Campaign Management:** Plan, execute, and/or manage marketing campaigns.
- **Automation & Workflows:** Set up workflows for lead nurturing, outreach, and retention.
- **Email & List Management:** Create and manage data-driven email campaigns.
- **Website Design & Development:** Scalable solutions based on your needs.
- **Content Creation:** Develop email, social, and web assets, articles, and more - all aligned with your brand.
- **Custom Projects:** Our in house talent and partner network enables Nook to solve your engagement challenges efficiently and effectively.



The Data Connector

Our Data Connector gives credit unions enterprise-level data integration capabilities, unlocking HubSpot's ability to deliver personalized, timely, and secure member engagement.

- **Member data integration:** Securely connects core and ancillary systems into HubSpot through the Nook Data Model and HubSpot's API.
- **Personalization enabler:** Provides the data credit union engagement teams need to design and deploy high-impact HubSpot campaigns.
- **Affordable, robust infrastructure:** Unlocks HubSpot's full potential without the enterprise price tag.



Unlock HubSpot's full potential with credit union data integration—robust, secure, and affordable.



Niche Experience Platform for Credit Unions

We deliver lifestyle experiences through a digital-first, co-branded platform. Product placement opportunities are driven by member behavior, enhancing relevance, building loyalty, and driving higher conversion rates.

The Platform Consists of Four Primary Components:



**Brand Creation
& Content
Development**



**User Interface
& Distribution**



**Relationship-
Banking
Execution Layer**



**Relationship
Intelligence
Layer**



In short, our tech-enabled marketing services empower you to:

Automate Smarter

Leverage AI-driven workflows and HubSpot-optimized tools to personalize engagement, centralize data, and drive loyalty.

Execute Faster

Gain access to CMO-level leadership, go-to-market strategists, and marketing execution teams - without the need for a full-time staff.

Engage Deeper

Deliver high impact segmented member experiences that strengthen relationships, build trust, and increase ROI.



Our Portfolio

Nook empowers our clients with AI-driven marketing automation, expert strategy, execution, and prebuilt engagement solutions—saving you time and resources.



- MARKETING SERVICES
- HUBSPOT OPTIMIZATION



TriUnity Foundation

DBA of St. Cloud Financial Foundation

- HUBSPOT IMPLEMENTATION
- HUBSPOT OPTIMIZATION



- HUBSPOT IMPLEMENTATION
- HUBSPOT OPTIMIZATION
- DATA CONNECTOR
- NICHE EXPERIENCE PLATFORM



- NICHE EXPERIENCE PLATFORM



- HUBSPOT IMPLEMENTATION
- HUBSPOT OPTIMIZATION
- DATA CONNECTOR



- HUBSPOT IMPLEMENTATION
- HUBSPOT OPTIMIZATION



- NICHE EXPERIENCE PLATFORM



- HUBSPOT IMPLEMENTATION
- HUBSPOT OPTIMIZATION
- MARKETING SERVICES
- WEBSITE DESIGN



- HUBSPOT IMPLEMENTATION
- HUBSPOT OPTIMIZATION



- HUBSPOT OPTIMIZATION
- MARKETING SERVICES
- CONFERENCE WEBSITE DESIGN



- MARKETING SERVICES
- HUBSPOT OPTIMIZATION

Providing strategic partnership and execution support that delivers measurable impact.



The major selling point for us is, it worked.
Dort Financial began seeing an uplift in
products in the 50-plus category.



Brian Waldron

CEO, Dort Financial Credit Union
\$2.2B, 121K members



Nook is solving a critical pain point for the
industry, and they've also assembled a
phenomenal team that expertly balances
strategy with speed to market.



Barb Lowman

President, CUNA Strategic Services



SMALL SPACE. BOLD IDEAS.



info@nook-inc.com



[linkedin.com/company/nook-2023](https://www.linkedin.com/company/nook-2023)



nook-inc.com/contact-nook