

# | Automate Smarter, Execute Faster & Engage Deeper

NOOK CAPABILITIES



[nook-inc.com](https://nook-inc.com)

# At Nook

We believe that technology and strategy work together to drive engagement, retention, and long-term growth.

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



# We deliver tech-enabled marketing services empowering 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 loyalty, and increase ROI.

# Nook is a Credit Union Service Organization (CUSO) and Certified HubSpot Solutions Partner, offering:



# | Expert help with HubSpot sales, implementation & utilization

- **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 programs & fractional talent

- **Full Campaign Management:** Plan, execute, and manage marketing campaigns on your behalf.
- **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.
- **Strategic Priority Alignment:** Align marketing strategies with business goals and leadership objectives.
- **Custom Projects:** Our in house talent and partner network enables Nook to solve your engagement challenge efficiently and effectively.

# | 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.

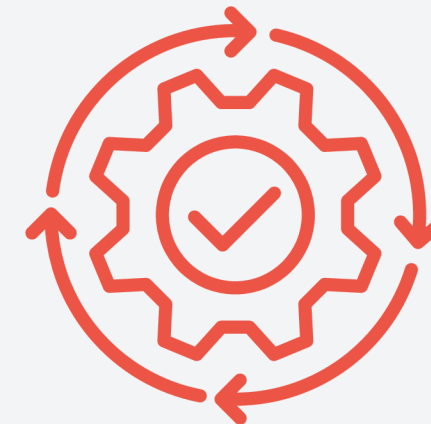
## THE PLATFORM CONSISTS OF FOUR PRIMARY COMPONENTS



**Brand Creation  
& Content  
Development**



**User Interface  
& Distribution**



**Relationship-  
Banking  
Execution Layer**



**Relationship  
Intelligence  
Layer**



# Our Portfolio



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



- HUBSPOT IMPLEMENTATION
- HUBSPOT OPTIMIZATION
- MARKETING SERVICES



- HUBSPOT OPTIMIZATION
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- WEBSITE DESIGN



- HUBSPOT IMPLEMENTATION
- HUBSPOT OPTIMIZATION
- NICHE EXPERIENCE PLATFORM



- NICHE EXPERIENCE PLATFORM



- HUBSPOT IMPLEMENTATION
- HUBSPOT OPTIMIZATION

Nook empowers credit unions, wealth management firms, and fintechs with AI-driven marketing automation, expert strategy, execution, and prebuilt engagement solutions—saving you time and resources.



# 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

# | Thank you



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