



# Western Union Banking | B2B Case Study

Prepared and executed  
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*Based on experience while working outside +IU Brand*



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GETTING A BANKER TO HAVE A CONVERSATION ABOUT MONEY ISN'T AS EASY AS IT SOUNDS

Western Union was expanding its money transfer service across the banking industry in the United States. Western Union was looking to identify and sell-in WU services through banks as a new Agent location. While many in the industry viewed money transfer services competitive with banks, Western Union could be a catalyst for revenue growth and new money in minute services traditional financial services could not offer.

**“The work done to establish Western Union as a viable partner with banks and financial institutions was well targeted and helped present WU to difficult to reach executives, generating qualified leads.”**

**JP Valdes**

Vice President, North America Marketing  
Western Union Financial Services

*This case study was executed by the team while working for another agency.*



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**Background** We were tasked with developing a comprehensive campaign of messaging for both direct sales and targeted media to reach influencers of the banking industry that make decisions for small to medium financial organizations, as well as tier one banks across the U.S. All materials were to be designed to support the global B2C brand positioning and reach the affluent executive level decision makers with a new message that Western Union can help drive revenue for their current banking customers and drive incremental customer growth among un-banked consumers.

The biggest challenge, getting on the radar screen of these highly targeted executives at a time they are thinking about business growth. Gain awareness and validate Western Union as a new service offering for their institution; and getting them interested enough to take a meeting to hear how Western Union can change their business.

**Solution** Reach the bank executive at the point they are thinking about the business and educating themselves on industry growth tools and services with a multi-media mix of targeted print and online advertisements. Adjust the global brand theme and positioning to speak from a voice of the executive, versus the money transfer consumer and design creative materials that feature the global scale opportunity of joining forces with Western Union even if the bank institution is local or regional to expand their customer base to international consumers.

Targeting the financial institution executive through Bloomberg and American Banker magazines and online portals and utilizing the highly selective Bloomberg Terminal interactive digital placement, C-level and executive titled individuals were reached with a consistent look and message to provoke a request for additional information and future meeting.

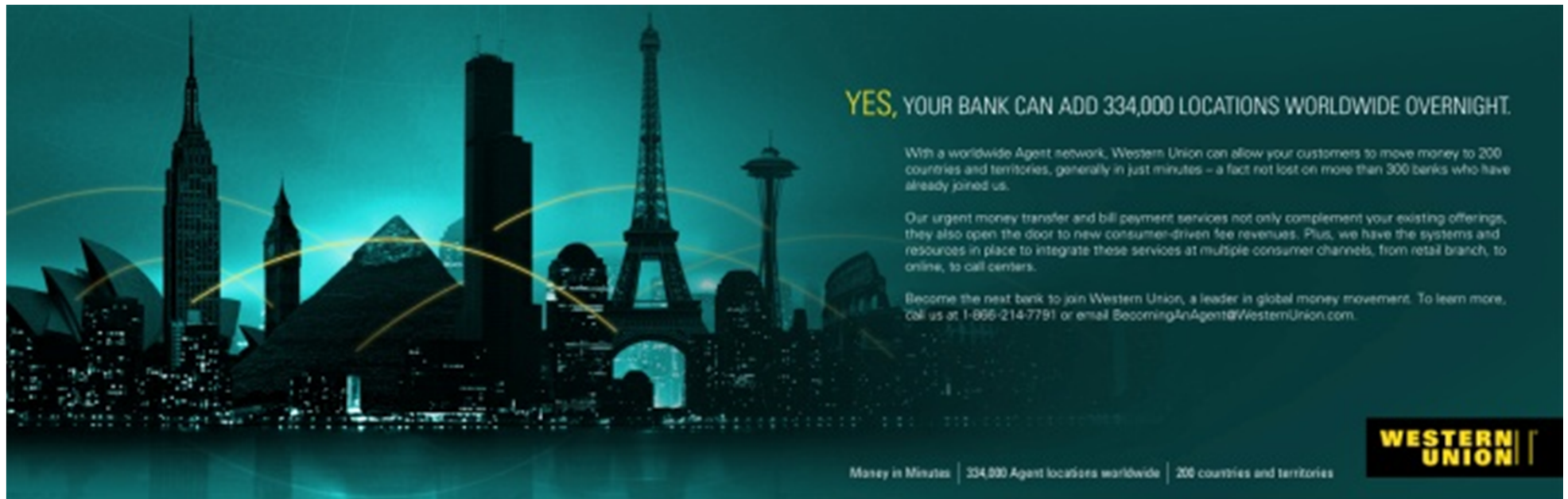
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**Results** Western Union got the banking industry to notice them as a partner opportunity that could drive future bank revenue growth with effective impressions among the targeted audience of bank executives driving financial category click through rates at **70% above** industry benchmarks above target number of direct names and titles by institution delivered from the online acquires for future communication and meeting development invitation by the leading industry trade show, BAI conference, to speak on new revenue growth partnerships.

So it is true. If you have a compelling reason to talk money, bankers will give you their name and number.

### Double Spread Magazine Print Ad



**YES,** YOUR BANK CAN ADD 334,000 LOCATIONS WORLDWIDE OVERNIGHT.

With a worldwide Agent network, Western Union can allow your customers to move money to 200 countries and territories, generally in just minutes – a fact not lost on more than 300 banks who have already joined us.

Our urgent money transfer and bill payment services not only complement your existing offerings, they also open the door to new consumer-driven fee revenues. Plus, we have the systems and resources in place to integrate these services at multiple consumer channels, from retail branch, to online, to call centers.

Become the next bank to join Western Union, a leader in global money movement. To learn more, call us at 1-866-214-7791 or email [becominganagent@westernunion.com](mailto:becominganagent@westernunion.com).

Money in Minutes | 334,000 Agent locations worldwide | 200 countries and territories

**WESTERN UNION**

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## Digital Display Ads

The image shows a desktop browser window displaying the Western Union website. The main headline reads "Western Union's Latest Bank Service: Fast Bill-Pay". Below this, there are several news articles and a prominent advertisement for SunTrust. The ad features a cityscape background with the text: "YES, YOUR BANK CAN ADD 334,000 LOCATIONS WORLDWIDE OVERNIGHT". To the right of the browser window, a Bloomberg Executive Portal email ad is visible, featuring a similar cityscape background and the headline "YES, YOUR FINANCIAL INSTITUTION CAN CREATE NEW REVENUE STREAMS BY OFFERING NEW MONEY MOVEMENT SOLUTIONS". The email ad lists several financial institution benefits and includes a call to action to visit the Western Union website.

## Bloomberg Executive Portal Email/Ads

This is a screenshot of a Bloomberg Executive Portal email advertisement for Western Union. The ad features a dark background with a cityscape and the Western Union logo. The main headline is "Western Union Holdings, Inc." followed by a paragraph describing the company's global electronic money movement services. Below this, there is a section titled "Company Overview" and "Important Announcements" with a list of news items. At the bottom, there is contact information for various regions including Australia, Brazil, Europe, Germany, Hong Kong, Japan, Singapore, and the U.S.

This is another screenshot of a Bloomberg Executive Portal email advertisement for Western Union. It features a dark background with a cityscape and the Western Union logo. The main headline is "If you recently moved or want to switch to home delivery, click here or visit HDLV <GO> to sign up." Below this, there is a section titled "OIL: iPATH EXCHANGE TRADED NOTE" and "YES, YOUR BANK CAN ADD 334,000 LOCATIONS WORLDWIDE OVERNIGHT". At the bottom, there is contact information for various regions including Australia, Brazil, Europe, Germany, Hong Kong, Japan, Singapore, and the U.S.

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**It's not just about branding.  
It's about relationships.**

