



Referral Contract Engagement

Streamline the lead generation process by establishing a referral contract where CU Station™ routes qualified leads to your credit union. Automate the lead generation and data collection process via seamless API integration, ensuring the correct information is captured for every lead. This allows for more efficient and scalable member acquisition and loan origination.

Key Features

- **Lead Qualification & Routing**
CU Station™ identifies qualified leads based on user behavior and preferences and then routes them directly to your credit union through an automated process.
 - **API Integration**
Automatically integrates with your lead generation forms via a secure API, ensuring all necessary lead information is collected and passed on in real-time.
 - **Seamless Data Collection**
The automated system collects all required data fields for new member sign-ups and loan applications, reducing manual errors and ensuring completeness.
 - **Contract Commitment**
To enable this automated lead generation, we will enter a Referral Contract with you that outlines the terms and processes, including lead payment structures and expectations for new member credentialing and data integration.
 - **Performance-Based Compensation**
MetaCato earns a commission for each successfully converted lead, including new members and closed loans. MetaCato will return 25% of the loan commission earned to the borrower through your agreed discounts. This creates a results-driven partnership where the community benefits and improves your engagement opportunity.
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Why This Matters

- **Automated Lead Generation**
This system eliminates manual lead entry, reducing time spent on administrative tasks and increasing the volume of high-quality leads coming to your credit union.
- **Scalable Growth**
Automated processes make scaling member acquisition efforts more efficient and cost-effective, ensuring sustainable growth without a significant resource increase.



- **Result-Oriented Partnership**

The performance-based compensation ensures that CU Station™ is fully programmed to deliver quality leads, making it a mutually beneficial arrangement.

Value Proposition

Partnering with MetaCato through CU Station™ and your standard Referral Contract Engagement allows your credit union to automate lead generation, enhance data collection efficiency, and access a continuous flow of qualified leads. Our performance-based model ensures that your credit union pays only for actual results, fostering a mutually beneficial partnership focused on growth and success.

FAQs

- **How do we know the leads are qualified?**

CU Station™ uses a data-driven approach to assess user behavior and preferences, ensuring only the most qualified leads are routed to your credit union.

- **What happens if our lead generation forms change?**

CU Station™'s API integration is flexible, allowing for seamless updates to forms as needed without disrupting the lead generation process.

- **How do we track the performance of the leads?**

We provide detailed reporting on lead conversion rates, new member sign-ups, and loan closures so you can measure the success of the referral contract engagement.

Next Steps

- MetaCato signs your referral partnership contract and defines the terms.
- Apply 25% of the referral fee back to the Borrow program, aligned with RESPA-approved processes, and communicate this through the CU Station™ portal.
- Streamline lead generation and data collection as part of CU Station™'s Call to Action.
- Integrate necessary APIs and finalize lead generation form details.
- Begin receiving qualified leads with real-time data on conversion rates, closes, and referral calculations.
- Develop electronic tracking for new member states and commission transfers.