



CASE STUDY

How Navy Federal Raised Application Rates 52% With Next Gen Video



For most homeowners, their house is their biggest financial asset. But knowing how to use that asset isn't so easy. Home equity can feel abstract and irrelevant: a number on a statement without much practical value.

Navy Federal Credit Union wanted to make that abstract idea concrete and actionable. As the world's largest credit union, serving millions of service members and their families, they've always put people before profits.

Putting that philosophy into action, for this campaign, that meant going beyond a generic offer and sharing a message that truly served the customer, showing not only what equity is, but how it could help them reach their personal goals.

That's where Next Generation Video comes in. With 1:1 personalization, it turned complex mortgage data into a clear, engaging story. Instead of feeling like a sales pitch, it felt like advice from a trusted partner.

The Challenge

Mortgage communications are notoriously complex. Industry jargon and dense statements can leave members unsure of where they stand or why it all matters. That lack of clarity can lead to missed opportunities – for the customer and for the lender.

Navy Federal set out to solve this by finding a way to:

- ✓ Explain home equity in terms members could easily understand
- ✓ Show each person their own data, not just generic examples
- ✓ Make the next step easy for members to take

The goal was simple: to demystify equity and make it accessible so members could confidently put it to work for them when the time was right.

The Solution

Navy Federal partnered with us to launch a Personalized Video campaign tailored to each mortgage holder.

Every video was unique, combining real account data with engaging visuals. Members could see:

- Their current mortgage balance
- The equity they had built in their home
- Ideas for how to use that equity, like funding home improvement projects or paying down debt

All of that easily fit in a video under 2 minutes long. Take a look.

Watch the Video

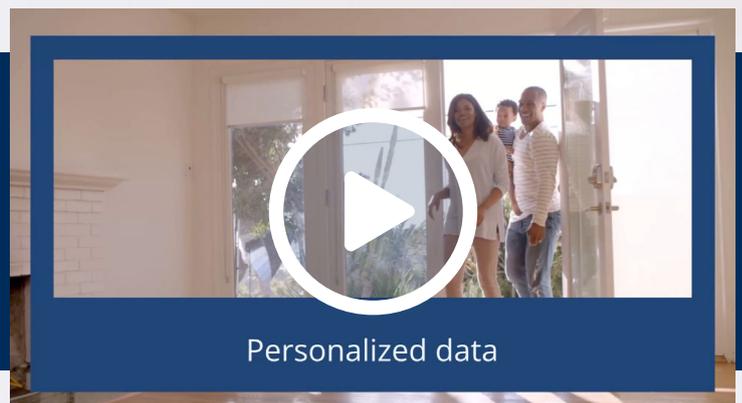


Success

You know it worked or this wouldn't be a case study, but the results really were impressive. The campaign drove a 52% increase in applications and delivered an estimated 85% ROI.

Case Study Video

If you'd rather enjoy this case study as a video, [Lucas AI Video Creator](#) sums up the highlights in (around) a minute.



Going beyond the metrics, the videos built trust. By showing members their own data in a transparent, visual way, Navy Federal positioned itself as a partner in helping them reach their financial goals.

It's a great example of how personalization changes the conversation. Instead of an email with a wall of text and complex info (that no one reads), members received a clear, engaging message that felt relevant, helpful and actionable.

A Look at the Numbers

52% increase in applications

85% estimated ROI

Looking Ahead

This campaign shows what's possible when financial institutions meet customers where they are – with personalised communication that simplifies the complex. (Hey, there's a reason most of our customers are in financial services: [banking](#), [insurance](#), [pensions](#), [mortgages](#) and more. Money matters are complicated.)

For Navy Federal Credit Union, the result was higher engagement, stronger member relationships and real business growth. For members, it meant clarity and confidence for a big financial decision.

But this is just one use case. From loan origination to onboarding to escrow analysis, Next Gen Video is transforming how mortgage providers connect with individuals.

If you have something to say to your customers – and you want them to pay attention and, just as important, understand – we can help.

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