

New Member Onboarding

About

New Member Onboarding is an email based onboarding solution focused on creating a warm and friendly environment for new members while educating them on all credit union products and services. It lasts for up to 90 days after membership opening and contains 8 Onboarding Touchpoints. We rely on live data and Dynamic Content to provide a personalized experience for each new member.

Onboarding Touchpoints can be thought of as a series of talking points throughout the new member's first 90 days specifically tailored to educate members on credit union

products and services. You can have up to 3 emails sent out at each touchpoint. These emails will rely on Dynamic Content formatting in order to determine the audience for each email.

Dynamic Content is variable content that uses if/then rules to determine the target audiences for each potential email option that you have selected. For example we can use credit score to determine if a member should receive a credit card offer or an email about financial literacy products that you may offer.

Deliverables

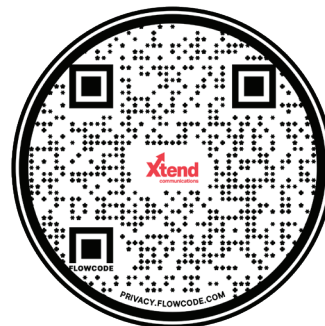
- Up to 8 Onboarding Touch Points
- 3 potential emails at each touchpoint
- Choose between standard or customized touchpoints, flow and content
- 3 dynamic content rules per email
- Monthly reporting offering details on email performance. Quarterly report providing details on basic product and service penetration rates from previous quarter NMO Audience as well as email performance.

How it helps

Provides flexibility in your marketing to offer a digital onboarding program to new members, without all of the manual processing.

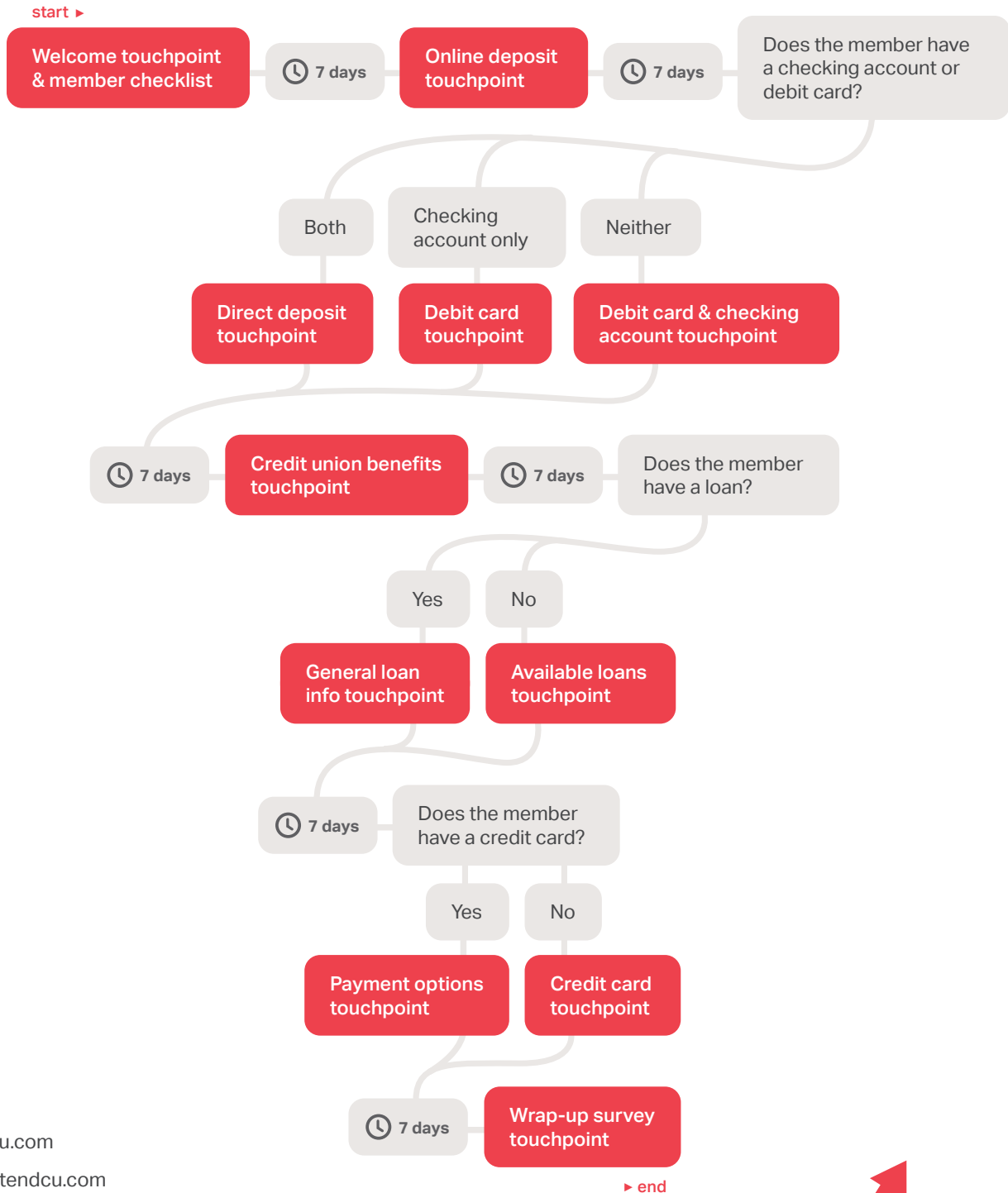
Creates a warm and inviting welcome to your credit union, with the goal of product and service education.

See reverse for a visual of the default onboarding flow.



The default onboarding flow

This an example of the default flow of New Member Onboarding. Timing, touchpoints and content can be fully customized to meet your needs.



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