

Account Retention Content Packages

Credit Unions & Community Banks

Increase account retention using proven strategies leveraged by traditional financial institutions and the world's leading fintechs.

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Onboard & Activate

\$5,000 one-time fee

Strategic communications for your account holders' first 90 days.

Your onboarding experience can make or break digital banking adoption, account funding, and first-year retention.

Working with your team, I conduct an audit of your onboarding and activation communications. Next, I provide content and technology recommendations to increase conversion rates. At the core of the program is a strategic email sequence to build trust and engage your members.

Content includes copywriting for:

- Email sequence (10-15 emails)
- Account opening screens
- In-app screens
- Push notifications (if used)

Program ROI

With new account acquisition costs of \$300 or more, this program pays for itself by retaining only 17 account holders. That doesn't consider the revenue gains from your new account holders being more engaged.

STEP 1

COLLECT (15-30 days)

- Kick-off (Email & 1 call)
- Information collection
- Creative brief development
- Creative brief review (1-2 calls)
- Tech recommendations 1-pager

STEP 2

CREATE (15-30 days)

- Copywriting for selected assets (emails, SMS, push notifications, in-app screens, etc)
- Design layout recommendations
- 2 rounds of revisions (1-2 calls)

STEP 3

CONVERT (90 days)

- Your team implements copy across all channels
- Monthly coaching call to monitor engagement and conversion of desired actions

Next Steps

LONG-TERM RETENTION

- Create long-term content strategy to drive retention

Long-term Retention

\$2,500 per month

Monthly content designed to engage and retain your account holders.

Once onboarded and activated, engaging account holders is key to developing loyal and profitable relationships.

After assessing your retention goals, I create a mix of cross-channel content to engage your members or customers month after month. Additionally, I include technology recommendations for your team to consider. The core deliverable is a mix of website, social, and email content.

Content includes copywriting for:

- Email promotions
- Engaging Newsletters
- Social posts
- Blogs

Program ROI

This program is designed to engage your entire account holder base. With average acquisition costs of \$300 or more, this program pays for itself by retaining just 9 account holders per month.

STEP 1

COLLECT (30 days)

- Kick-off (Email & 1 call)
- Information collection
- Strategy brief development
- Strategy brief review (1-2 calls)
- Tech recommendations 1-pager

STEP 2

CREATE (Ongoing Monthly)

- Creative brief planning (1 call)
- Creative brief review (1 call)
- Copywriting for selected assets (emails, newsletter, blog, etc)
- 2 rounds of revisions (1-2 calls)

STEP 3

CONVERT (Ongoing Monthly)

- Your team implements copy across all channels
- Monthly coaching call to monitor engagement and conversions to influence next month's content

Next Steps

CONTINUOUS IMPROVEMENT

- Evolve content strategy with technology improvements and testing new content formats and distribution channels

Ready to grow your loans and deposits at the same time you increase retention?

DIGITAL
GROWTH
INSTITUTE



I've partnered with [Digital Growth Institute](#) to help your credit union or bank grow. With Digital Growth Institute's Website Secret Shopping program, you'll get a Website Optimization Gameplan to increase your loans and deposits.

Register for both programs to **receive 10% off my Onboard & Activate program.**

Website Secret Shopping

Stop losing loans and deposits

Did you know that 94% of bank and credit union websites have never secret-shopped their website despite 87% of consumers beginning their financial journeys online? Make every website visit count with when you secret shop your website.

Member Retention

Stop losing members or customers

A Fiserv study found that digital banking users were 35% less likely to leave, compared to non-digital users over a 15-month period after enrolling in digital banking. Now is the time to start engaging account holders, driving digital enrollment to create long-term loyalty.

