Credit Union and Community Bank Onboarding Email Flow Outline

Contact Kelly Chambers for questions or implementation guidance
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Day 0 - Welcome! You're account is ready

- Welcome message from VP or C-Suite lead of Operations
- Summary of account features/benefits
- Account Checklist:
  - App download
  - Online banking setup
  - Fund account and/or make payment
  - Any other enrollment in services
- CTA - Digital banking and funding setup

Day 1 - Thank you from the CEO

- Intro with 1-2 sentences about the institution's mission
- Impact (products, services, and community), examples:
  - We've helped X,XXX members of our community buy a home
  - We've helped X,XXX people get into new cars with low-rate auto loans
  - We've helped X,XXX people lower their debt to live a healthier financial life
  - We've donated $XXX,XXX to local non-profits in 2023
  - We've given XX,XXX hours of staff time, volunteering in our local community
- CTA - 1-question survey: What are your goals for the next 12 months?

Day 2 - Get the most out of your account

- Digital banking guide
- Money movement summary
- Branch and ATM summary
- CTA - Login into digital banking

Day 3 or 4 - “We got your back” security message

- Security is a top priority message from CTO
- How to use digital banking security features (Lock card, etc)
- Tips for living a secure financial life
- CTA: Login to digital banking to use security features

Day 4 or 6 - Financial guidance

- In-email quiz: What % of Americans set financial goals? (provide answer in the email and explain different types of goals)
- CTA - 1-question survey: What are your goals for the next 12 months?

Day 5 or 8 - We’re here wherever your journey takes you

- Visual (and fun) way to show journey w/ products (all products/services)
- Include social proof for each product
- CTA: Explore products/services

Day 6 or 10 - Benefits of your account

- Clearly show value prop of account
- Rewards/benefits of account (ex: points, free insurance, shopping discounts, etc)
- Money management tools if FI has them (EX: PFM, etc)
- CTA: Dependant on FI’s account benefits and money management tools

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Day 7 or 14 - Top 3 ways/tools to manage your money

- Ways to save (different ways to fund accounts, automate savings, etc)
- Money movement tools (internal and external)
- PFM, budgeting, or other financial tools if offered
- CTA: Set up a free consultation to review your financial health

Day 15 - Short survey

- Use thumbs up or thumbs down buttons in the email if no survey software available at the financial institution
- Email sent from member/customer Support Lead (Director/VP/C-Suite level)
- CTA: Reply to the email or use survey software to collect answers to: "Did you get everything you expected from your new accounts? What else can we do for you?"

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