



**Get them to use their
accounts & inspire them
to come back for more**





Connect

Guide customers & members with personalized digital journeys

The platform empowers small teams with best-practice campaign templates & an intuitive editing experience. Advanced features give marketers total flexibility & creative control.

Tap our team of experts who will help you create, launch, and optimize everything.

Email messages

Get unlimited messages & mobile responsive design.

Text messages

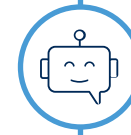
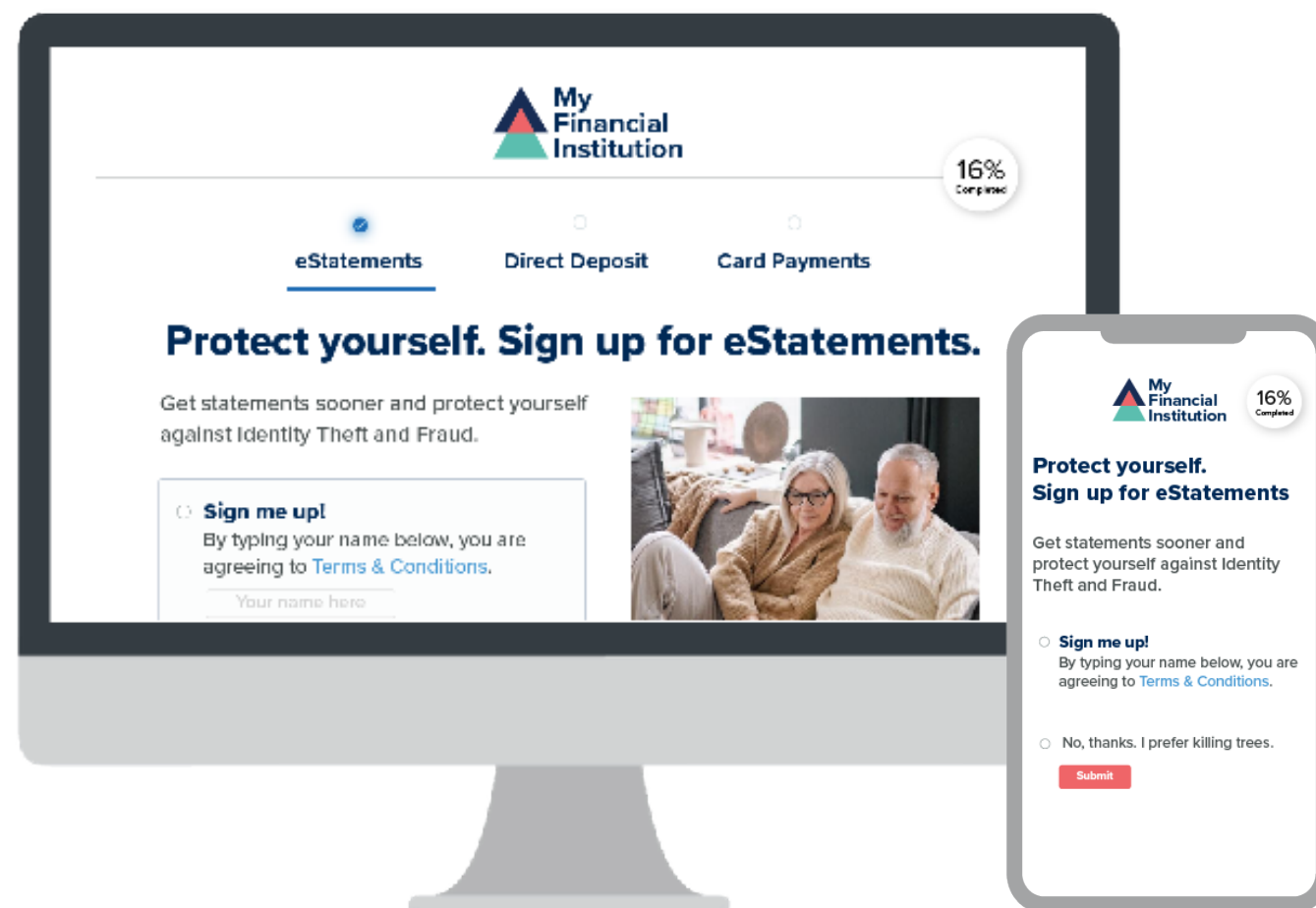
Get unlimited SMS text messages & short code support.

Microsites & landing pages

Link messages to campaign microsites, landing pages, or another destination. Add widgets that make it easy to adopt account-related services & other products.

Digital banking promo units

Deliver campaigns & widgets inside digital banking.



Engage

Use widgets & specialized tools to personalize campaigns & remove friction. Make it easy for people & businesses to engage.

Drive adoption

Enrollment Widget: Help them enroll in any service & accept product terms without logging in.

Gamification Tool: Help them track their progress when there are multiple steps to complete (e.g., new account activation) or criteria to meet to earn rewards for referrals.

Increase direct deposits

Direct Deposit Widget: Help them enroll in direct deposit without entering an account number.

Personalization Widget: Let them securely retrieve an account/member number to enroll in direct deposit the old-fashioned way.

Grow transactions

Card on File Widget: Help them update the default payment method at multiple merchants at once (Amazon®, Venmo®, Netflix®, etc.).

Boost digital usage

Mobile App Widget: Help them get the right app for their device (iOS, Android).

Personalization Widget: Let them securely retrieve an account/member number to enroll in digital banking.

Enrollment Widget: Help them enroll in eStatements without logging in.

Video Embed Widget: Share digital banking tutorials.

Build personal relationships

Dynamic Campaigns: Automatically suppress messages, page content, and digital banking promo units as people & businesses take action or your targeting criteria changes.

Personalization Widget: Use any data point to personalize your offers & campaigns.

Video Embed Widget: Introduce your institution, their Relationship Manager, and more with your pre-recorded videos.

Deliver a unified experience

Cross-Channel Engagement Tool: Deliver campaign content, tools, and widgets inside digital banking. Sync reporting & analytics across channels.

Blend digital & human support

Chat & Video: Embed your support tools into any microsite or landing page. It's the best of both worlds to deliver a self-service experience with instant access to help.

Expand lines of communication

Email & Text Opt-In Widget: Capture emails, mobile numbers, and consent to message.

Capture feedback

Survey Widget: Discover additional financial needs, measure satisfaction, and collect other feedback. Automatically retarget people with personalized cross-sell campaigns that convert.





Manage & Optimize

Streamline approvals

The Packaging & Approvals Feature makes it easy to share campaign drafts & collect feedback from colleagues. A single PDF contains all campaign details. Use it to train & prepare staff. Capture an audit log of campaign review & approval history.

Import data easily & securely

Import data via our API, Symitar Episys integration, SFTP, and CSV upload. Using these methods, we can integrate any core, online banking solution, online account opening solution, or CRM platform.



Target automatically

Use our simple Automated Targeting Feature to set up rules that define the people & businesses that receive campaigns. Set up retargeting rules to follow up with those that have yet to take action.

Go live in weeks

There's no software to install. There's not much work for IT. Most institutions launch their first campaign 6-8 weeks after kick off.

Get instant insights

Instantly see how campaigns & widgets perform at helping you achieve your objectives. Access campaign engagement statistics & business objective completion data for individual campaigns and in aggregate.



See the platform

DigitalOnboarding.com

Book a demo on our website & we'll create a customized campaign example to address your institution's top organic growth objective.



Contact us at
Sales@digitalonboarding.com