SCE FCU

Acquires 33% more members, cross-sells additional products, and cuts staff workload with a simpler process

Background

SCE Credit Union (SCE FCU) wanted to grow its business by attracting more community residents to join.

Campaign Goals

Motivate pre-approved prospects to join the credit union and open credit cards with a quick, intuitive acceptance process.

Process

Mailer & QR code

Microsite & enrollment widget

Onboarding campaign

Campaign Tactics

SCE FCU sent pre-approved prospects a single mailer featuring a personalized QR code that linked recipients to their Digital Onboarding personalized microsite with plain language instructions on how to accept the offer. The microsites also highlighted the benefits of joining the credit union.

Personalized microsites featured Digital Onboarding's Enrollment Widget designed to remove friction and make it easy to accept pre-approved product offers and enroll in account-related services. The widget presented prospects with the credit card as well as membership terms and conditions, and let them accept the offer without having to speak with an SCE FCU team member. Members simply accepted the terms and provided an eSignature to open a credit card.

After accepting the offer, the new members received an onboarding campaign guiding them through card features, payment options, eStatement enrollment, text message opt-in, and downloading the SCE FCU mobile app.

About SCE Credit Union

SCE Credit Union serves nearly 65,000 member-owners, has over $1 billion in assets, and physically operates in a variety of convenient locations across Southern California and Southern Nevada. For more information, visit SCEFCU.org. At SCE Credit Union, your membership matters. Members can expect outstanding service, great rates, and to be treated like an individual, not just a number.
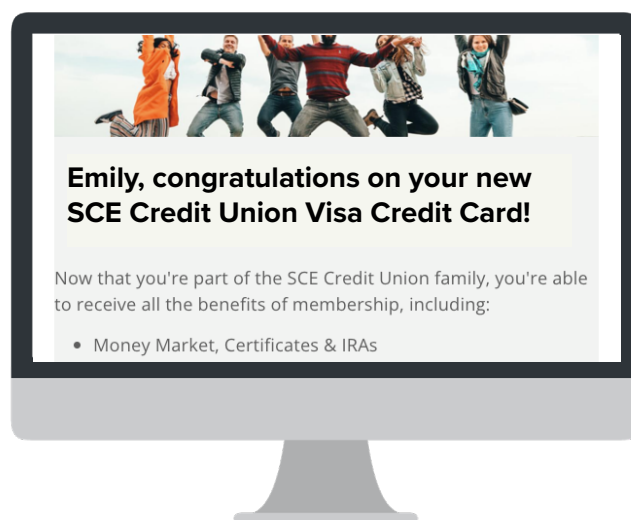
Campaign Tactics Visualized

Print mailer with QR link to microsite
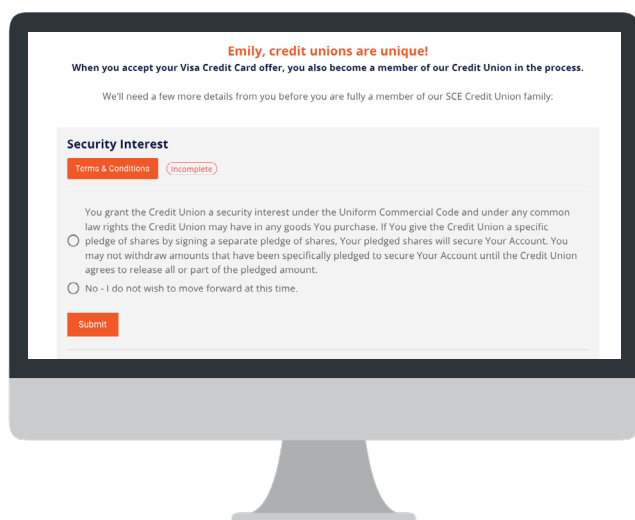
Enrollment widget to easily enroll in account-related banking services

New members receive onboarding campaign

Campaign Results

Compared to an average month, **SCE FCU booked 33% more accounts during this month-long campaign and extended more than $1 million in combined credit.** Of these members, 12% deepened their relationships further by opening additional products, such as checking accounts, savings accounts, and loans.

As an added bonus, the automated campaign was intuitive enough that applicants were able to join the credit union and accept the credit card offer without having to call the Member Care Center team to originate their accounts. This reduced SCE FCU staff workload and **saved the credit union 184 hours of staff time in just over one month.**

"To grow efficiently, a credit union must be able to deliver simple processes that eliminate pain points for members. The Digital Onboarding engagement platform was designed to make it nearly effortless for prospective and current members to adopt products and account-related services, and it was a huge factor in our success.

We are incredibly pleased with the results, the process, and the support we received from the Digital Onboarding team!"

Annette Coronado
Director of Marketing & Communications

About Digital Onboarding

The Digital Onboarding engagement platform helps banks and credit unions turn account holders into engaged and profitable relationships. Email and text messages link customers and members to their personalized microsites. Self-service tools helm them enroll in direct deposit in seconds, update default payment methods at places like Amazon and Venmo, adopt digital banking, and more.

Connect with us

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