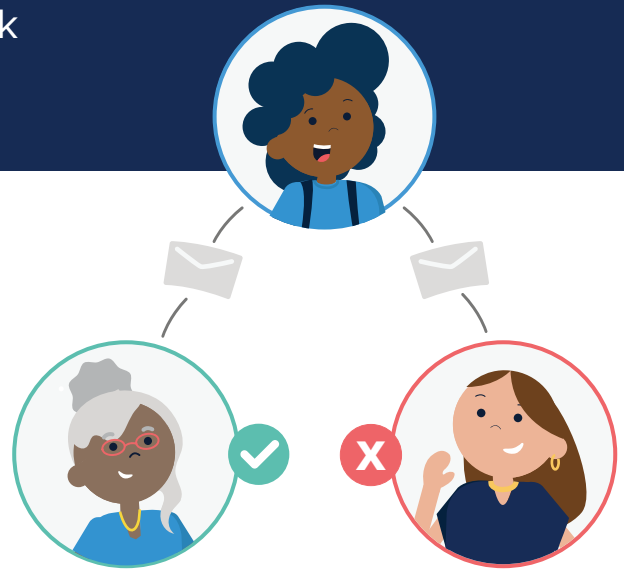# Automate campaign approvals

Share campaigns, manage feedback & track approvals

THE OPPORTUNITY

Financial institutions must meet strict regulatory requirements, and managing the marketing campaign review process can get messy. Too often, Marketers resort to taking campaign screen shots and manually documenting the details for Approvers.

Marketers need a way to instantly share all of the details of a campaign with multiple colleagues at once. They need an easy way to track feedback from multiple sources, and ensure that campaigns receive all of the necessary approvals before they launch.

THE SOLUTION

The Digital Onboarding Packaging & Approvals feature automates and streamlines the campaign review and approval process.

Streamlined Reviews
Send campaigns to Approvers simultaneously, collect feedback, and track approvals

Consolidated PDF
Provide Approvers with a single PDF file that packages the campaign creative with all of the campaign details

Audit Log
Access historical campaign review and approval details with timestamp insights

Easily Accessible
Include campaign Approvers even if they don't have access to the Digital Onboarding platform

Status Indicators
Visit the Campaign Dashboard to instantly see the approval status for each campaign

Staff Education
Ensure that staff are aware of campaigns. Share a single PDF with all the details.

ONE PACKAGE. ALL THE DETAILS.

The Digital Onboarding platform will generate a PDF with all the campaign details for review and approval.

The campaign PDF includes:

Overview of the campaign
Benchmarks, incentives, and a personalized message

Supporting assets
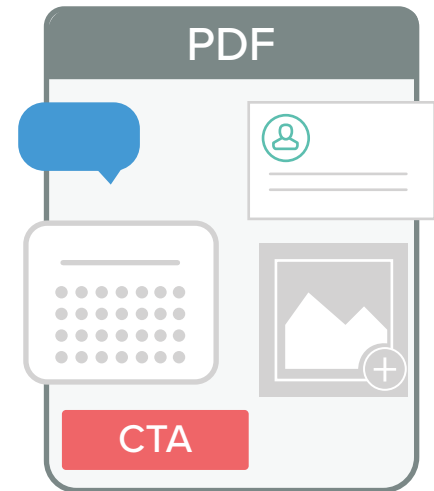Microsite/Landing pages, emails, SMS text messages

Message schedule
When your emails and SMS text messages will be sent

Targeting conditions & impact
Number and description of the contacts in the campaign

Call to Action (CTA)
Summary with clickable URLs

GET STARTED

The Packaging & Approvals feature can be enabled within days. No development resources required. Contact your Account Manager or message sales@digitalonboarding.com to get started.

Corporate Headquarters
68 Harrison Ave
#605, PMB 42644
Boston, MA 02111

Phone: (267) 422-5292

sales@digitalonboarding.com