

# Onboarding Assessment Checklist



## Do you...

- Use a highly-aggressive, carefully mapped 90-day customer journey to optimize response?
- Educate new consumers, reinforce product value propositions and grow relationships early?
- Personalize your onboarding efforts to avoid irrelevant communications and missed opportunities?
- Ensure each communication is focused on a clear CTA that drives directly to the information customers need to optimize response?
- Clearly and simply reinforce benefits through consistent and ongoing education?
- Optimize channel use, prioritizing email while incorporating other channels to supplement and further support your efforts?
- Take advantage of cross-sell opportunities to keep customers engaged and increase lifetime value?
- Use systematic testing of messages, creative, timing and channels to refine your efforts?

## Looking ahead: the future of onboarding

As financial institutions embrace digital-first banking, where account information and credentials are instantly accessible through digital wallets and mobile banking, the next generation of onboarding requires unique and accelerated touches/messaging.

- **44% of cardholders say instant access elevates satisfaction.**<sup>1</sup>
- People who log in on at least four separate days during their first month are **550% more likely to still be active a year later.**<sup>2</sup>
- **50% of financial institutions** plan to add digital instant-issue ability to their debit card lineups — pushing payment credentials directly to digital wallets.<sup>3</sup>

1. Deloitte 2021 Consumer Payments Survey

2. How to Build Long-Term Digital Engagement, MX, 2024

3. 2024 PULSE® Debit Issuer Study

## Ready to optimize your onboarding?

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