

TruStone

Gets non-digital banking members to use digital services & exceeds digital engagement goal by 263%.



Background

TruStone Financial Credit Union (TruStone) recognizes the importance of streamlining customer service by boosting digital banking engagement across its member base. Despite robust membership, TruStone identified a significant portion of existing members who were not using any digital services.



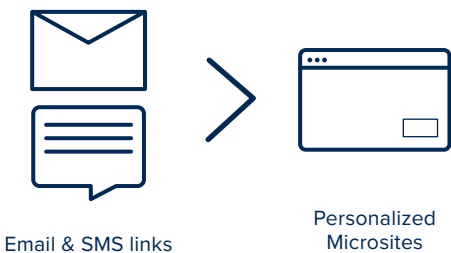
Campaign Tactics

TruStone leveraged the Digital Onboarding engagement platform to launch a multi-channel campaign that included email and text messaging. Over a 28-day period, TruStone delivered four emails and three text messages to members who were not using digital banking. Each communication led members to their personalized Digital Onboarding microsite. Once members began using digital banking services, messages stopped.



Campaign Goals

TruStone set a 2023 Corporate Goal to have a net increase in members using digital banking services with an average increase of 11 members using per day.



About TruStone Financial Credit Union

TruStone Financial is a full-service credit union that has worked to improve the financial well-being of its neighbors since 1939. Having been founded as a teachers' credit union, education is driven into the mission. It has 23 branches across Minnesota and Wisconsin and is Minnesota's second largest credit union, with assets of \$4.7 billion and a mortgage servicing portfolio of more than \$2 billion.



Campaign Tactics Continued

The microsites provided clear instructions for navigating the online banking portal, downloading the mobile app, and enrolling in eStatements. Microsites also included several Digital Onboarding features and widgets that remove friction from the enrollment process, such as:

- SMS Opt-In Widget**
 Allows members to sign up to receive text messages from TruStone
- Mobile App Download Widget**
 Enables members to download the TruStone mobile app without having to search the app store
- Video Embed Widget**
 Allowed TruStone to embed a video tutorial on how to set up online banking
- Secured Personalization**
 Helped members securely retrieve their account numbers within the microsite when they entered a secure token

SMS Opt-In

Hello, Jane.

It's time. Manage your money on the go with TruStone Online Banking and the Mobile App for secure, fast and reliable access - anytime, anywhere.

First, simply verify your mobile number below and opt in to receive text messages from TruStone. You will receive a text message to verify enrollment.

Remember, you can unsubscribe at any time.

 Enter your mobile number _____

OPT-IN MOBILE NUMBER

Mobile App Download

MOBILE APP

Manage your money on the go.

Your mobile number _____

SEND ME THE LINK 

Secured Personalization

Use your account number to enroll today:

[click to reveal](#)

ENROLL IN ONLINE BANKING

*Credit Monitoring and Score are for informational and educational purposes only. There are various types of credit scores, and TruStone may use a different type of credit score to make lending decisions.



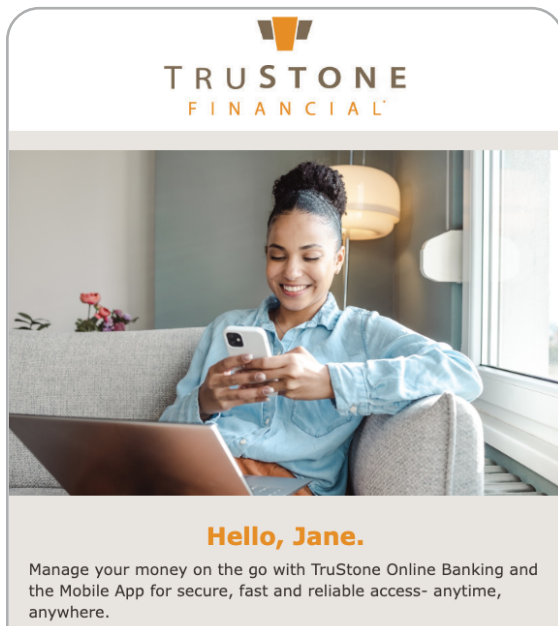
Campaign Results

This campaign surpassed the daily goal by 263%, with an average of 29 members becoming active digital banking users per day during its duration. 1,425 existing members can now manage their banking needs using their computers and mobile devices, reducing the need for branch visits and saving staff time.

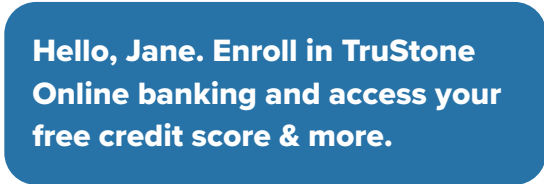
“It’s a mistake to think that members aren’t using digital banking services because they prefer traditional channels. Credit unions that make it really easy to use services will see adoption rates soar. The Digital Onboarding engagement platform is our secret weapon!”

- Megan Primeau
SVP Product Line Marketing

Email message



Text message



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 help them enroll in direct deposit in seconds, update default payment methods at places like Amazon and Venmo, adopt digital banking, and more.

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