

HOW TO BUILD AN ONBOARDING EMAIL SERIES

Create a three-month email campaign series to build trust and cross-sell new banking customers.



**EMAIL #1:
WELCOME**
(Immediate)



**EMAIL #2:
ENROLL**
(Week 2 Followup)



**EMAIL #3:
EDUCATION**
(Week 6 Followup)

Welcome new customers to the family. Using variable content, include their closest branch and ATM.

Encourage customers to enroll in online banking and connect on social media. Include their closest branch and ATM again.

Offer relevant information on additional services, ask for referrals, and remind them of special features.



**EMAIL #4:
CROSS-SELL**
(Week 10 Followup)



**EMAIL #5:
STAY IN TOUCH**
(Week 12 Followup)

Use variable content blocks to advertise a complementary product based on first sale.

Offer a second cross-sell, remind customers of referral program, and trigger email newsletter signups.

**Want to see our automated
email flows in action? Contact
us to set up a demo.**

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START ONBOARDING 