

Platform feature overview

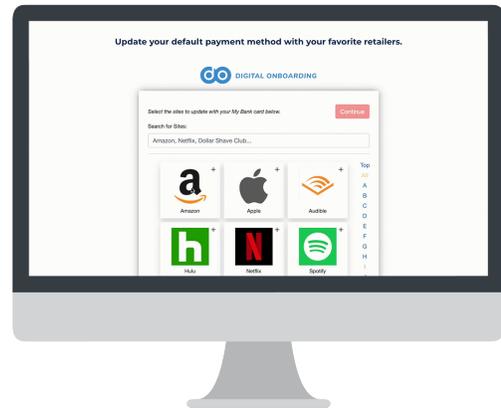
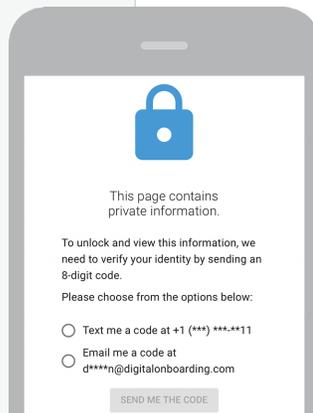
Introducing the digital engagement platform built for financial services.

Tools that build business

Tap into a library of digital features designed with financial institutions in mind.

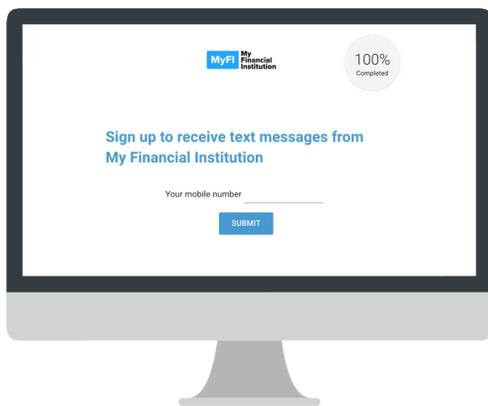
Share sensitive data securely

If customers lose or forget their account numbers, they may never enroll in direct deposit or digital banking. Share it and other sensitive data securely with our Secure Personalizations Feature.



Grow card transactions

Bill pay is dead. Biller-direct payments are in. With our Card on File Feature, cardholders can make your card the default payment method at multiple merchants - instantly.



Capture email & SMS opt-ins

Unable to email and text customers and members? We'll bridge the gap. Use our Opt In Feature to capture emails, mobile numbers, and consent to message customers.

Increase mobile app usage

Digital banking is more important than ever. Embed our Mobile App Download Widget into a campaign. Make it easy for people to get the right app for their devices.



A platform to connect

It's not hard to build relationships digitally. You just need the right platform.



Use best-practice campaigns

Financial institutions have similar business objectives. We've seen what works. Use ready-made, Best-Practice Campaigns out of the gate, tweak them, or invent your own.



Trigger email & SMS messages

Create personalized email and SMS messages. Send as many as you'd like - without paying extra. Stop messages automatically when customers complete the desired action.



Deliver personalized microsites

Navigate customers through complex tasks and deliver educational content via Personalized Microsites. Share videos, images, documents, branch locators, and more.



Edit multiple campaigns at once

Reuse messages and microsite pages in multiple campaigns. To update the content, make the changes once and instantly update all of the campaigns where the assets are used.



Create one-to-one relationships

Make campaigns sound more personal. Use any datapoint to personalize messages and microsites. Connect customers to relationship managers. Present customized offers that convert.



Collect instant feedback

Learn how to better serve customers and identify additional needs. Use our Survey Widget to collect instant feedback via multiple choice and open ended questions.

Marketing made simpler

Target, test, and track campaigns in a flash.



Target & test automatically

Decision trees are tedious to build—we created smart targeting and testing tools that are painless.



Measure business impact

Measure how campaigns impact your business, track progress with graphical dashboards, & drill in for a deeper look.



Get the help you need

Our team will help you sail through platform implementation, launch best-practice campaigns, measure results, and optimize campaigns.

Request a demo

We serve financial institutions of all sizes. Our platform supports investment management firms, credit card processors, banks, and credit unions. We'll show you how easy it is to create digital campaigns that grow your business. Message sales@digitalonboarding.com to get started.

