

# CASE STUDY: THE VALUE OF ONBOARDING

**BACKGROUND:** A western financial institution with \$30B in assets needed a program to welcome new customers. Harland Clarke developed an onboarding program that included a welcome package designed to increase the number of banking relationships among the bank's customer base. When Harland Clarke received a new account file, we sent the account holder a welcome package from the bank.

## RESULTS:

**38%** **Income** from new account holders increase



**Sticky product** penetration increased:

**21%** Online banking

**33%** Bill pay



**30%**

**lift** in the number of accounts per household



**50%** **Three-service** household increase

**400%**

**Four-service** household increase



## What does this all mean?

Welcoming and engaging account holders during the first 90 days of an account opening, can help deepen account holder relationships.

Want to know more? [Download our white paper](#),  
"10 Strategies for an Award-Winning Onboarding Solution"  
or visit [harlandclarke.com/onboard10](http://harlandclarke.com/onboard10).



Institution size, assets, campaign results and statistics based on client data. Many variables impact marketing campaign success. Information on earnings or percentage increases that is contained within this case study is provided for demonstrative purposes only. Harland Clarke does not guarantee or warrant earnings or a particular level of success with a campaign.