

A close-up photograph of a woman with dark curly hair, wearing a grey blazer over a black top, holding a white smartphone in her hands. She is looking down at the phone. The background is blurred, showing an outdoor setting with a building and some greenery.

DIGITAL & TRADITIONAL ADOPTION BEST PRACTICES

DIGITAL CHANNEL ADOPTION BEST PRACTICES

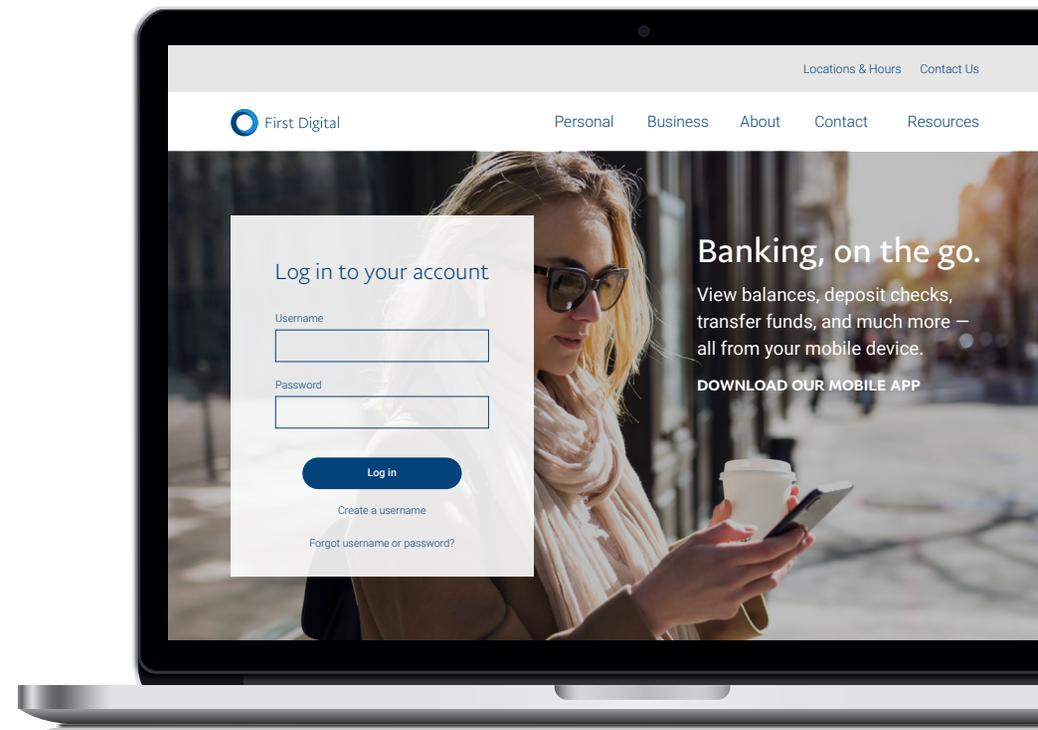
Your digital channel is one of the most powerful ways to attract new customers, generate awareness of your digital capabilities, and promote adoption. Below are several best practice marketing examples to help drive adoption.

WEBSITE

Your website is the gateway to your brand. By building out your content, you create a seamless experience for your users—and a reliable resource for them to learn more.

Homepage Promotions

The first thing your users see before they log in to online banking is your homepage. It presents the perfect opportunity to increase awareness of a new feature. Many financial institutions have a space for a rotating banner ad to showcase different products and offers. Use this space to promote digital banking capabilities like your mobile app, or a new feature like digital receipts.



Dedicated Solution Page

Make sure you have a dedicated webpage for digital banking (or online and mobile banking)—and that it is prominent in your homepage navigation. Any time you add a new feature, make sure to update your dedicated webpage with mention of the new feature and links to any relevant content like videos or educational materials.



Responsive Design

Ensure the page is responsive, meaning that it will render well on a variety of devices or screen sizes—including those of smartphones, tablets, and desktops.

Vanity URL

Make it easy for your users to get to your dedicated solution page by creating a vanity URL. This makes it possible to include a short, easy-to-remember URL such as [FIName.com/digital](#) in your marketing materials.

Educational Materials

Include links to educational materials and “how-to” information on your dedicated solution page. Include items like frequently asked questions, how-to videos, and demos.

ONLINE AND MOBILE BANKING

Your online and mobile banking solutions present several opportunities to meet customers in their channel of choice with relevant, contextual marketing messages.

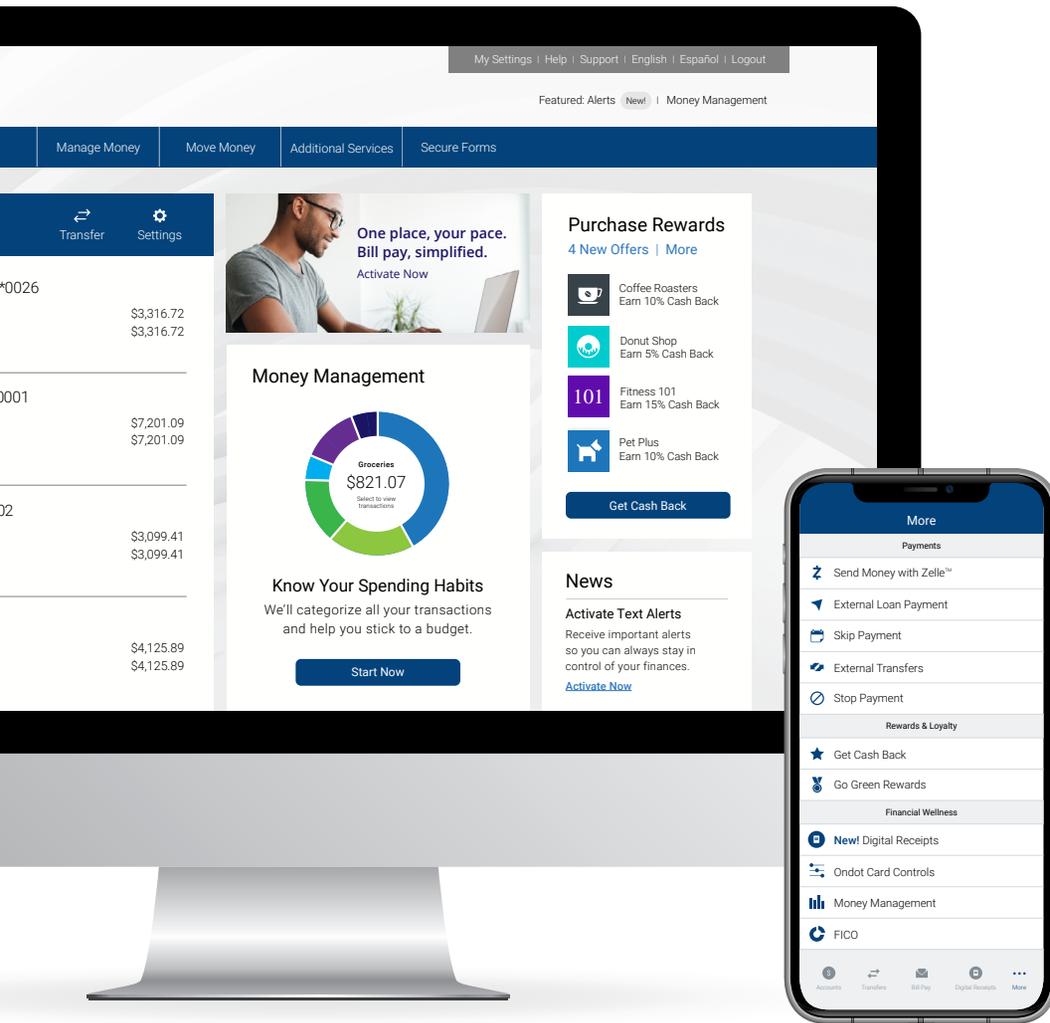
Login Prompt

A login prompt is a page that appears after a user logs in to online or mobile banking, but before they reach their desired landing page. It creates a very targeted opportunity to present quick, relevant information and a call-to-action. The login prompt should present the user with the option to take action or proceed to online or mobile banking.

Logout Prompt

When a user logs out of online or mobile banking, they land on specific webpage where a logout prompt or message may be displayed. The logout prompt is another unique opportunity to present users with a call-to-action—and at a time in which they may be more receptive to taking action, as they've just completed their prior task.





Ad Space

Several ad spaces are available throughout your online and mobile banking experience and can be controlled through NCR Promotion Suite. This tool enables financial institution administrators to create targeted messages and run multiple messages at the same time. In addition, when multiple messages are running in the same placement, our smart targeting capabilities prioritize the option that best matches the individual user.

Navigation

Once a new feature is available, prominently place it in your navigation; call attention to it with a custom icon and text (e.g., New! Digital Receipts). With NCR Admin Platform, you're in control of which features display in your navigation, the order in which they appear, and their branding.

EMAIL

Email marketing is an essential tool for attracting and retaining customers. It's a cost-effective way to communicate product information, new digital features, and educational content. In addition, if your financial institution can segment your users, you can target specific groups of users with different targeted messages.

SOCIAL MEDIA

Social media can help banks and credit unions create brand awareness and communicate with consumers in their preferred channel. Make sure to maximize your social presence (e.g., Facebook and Twitter) by regularly promoting new and existing digital banking features. Assign staff members to manage your social media pages to ensure timely responses to users who have questions or issues.



First Digital @FirstDigital • 7 min

[#Security](#) Tip: Go paperless. Use one of our trusted payment solutions like Zelle® or Bill Pay, and keep your account information confidential.



First Digital @FirstDigital • Dec 23

Traveling over the holidays? With Card Management, you can notify us of your travel plans in your [#FirstDigitalMobile](#) app before you hit the road—so we can help keep your accounts safe.



First Digital @FirstDigital • Nov 18

"Hey Alexa, what's my savings account balance?" We've enabled [#VoiceBanking](#) with Amazon Alexa enabled devices, so be sure to download the Amazon app and enable our [#FirstDigital](#) skill today!



TRADITIONAL CHANNEL ADOPTION BEST PRACTICES

INTERACTIVE VOICE RESPONSE

With over 81% of adults in the U.S. now owning a smartphone², it's likely most consumers calling an Interactive Voice Response (IVR) are doing so from a smartphone. This makes your IVR an excellent place to include a message about your mobile app or a new mobile feature. Plus, it presents an opportunity to convert those who use IVR, to a much lower-cost channel.

CALL CENTER MESSAGING

Train your call center employees on your digital banking capabilities so they can cross-promote this lower-cost channel during their conversations with callers. Support them even further by developing call scripts or use cases to help them identify key opportunities to cross-promote digital banking.

Take for instance a customer or member calling in to make a transfer over the phone. Once the transaction is complete, the call center employee offers, "Did you know you can save time by using our mobile app to transfer money?"

On-hold messaging is another great place to cross-promote digital banking. It can help distract callers when there is a wait to speak with a call center representative.

IVR PRO TIP »

YOU CAN USE AN IVR MESSAGE SUCH AS:

"Did you know you can use our mobile banking app to securely check balances, pay bills, transfer funds, and deposit checks—right from your smartphone.

Simply search First Digital in the app store to download our mobile app today."



ATM SCREENS

ATMs present a low-cost opportunity to strengthen brand awareness. They include prime real estate to display targeted ads to your customers or members and are an excellent channel to promote quick-hit information like your mobile app. Be sure to include quickly recognizable calls-to-action such as app store badges.

PRINTED MATERIALS

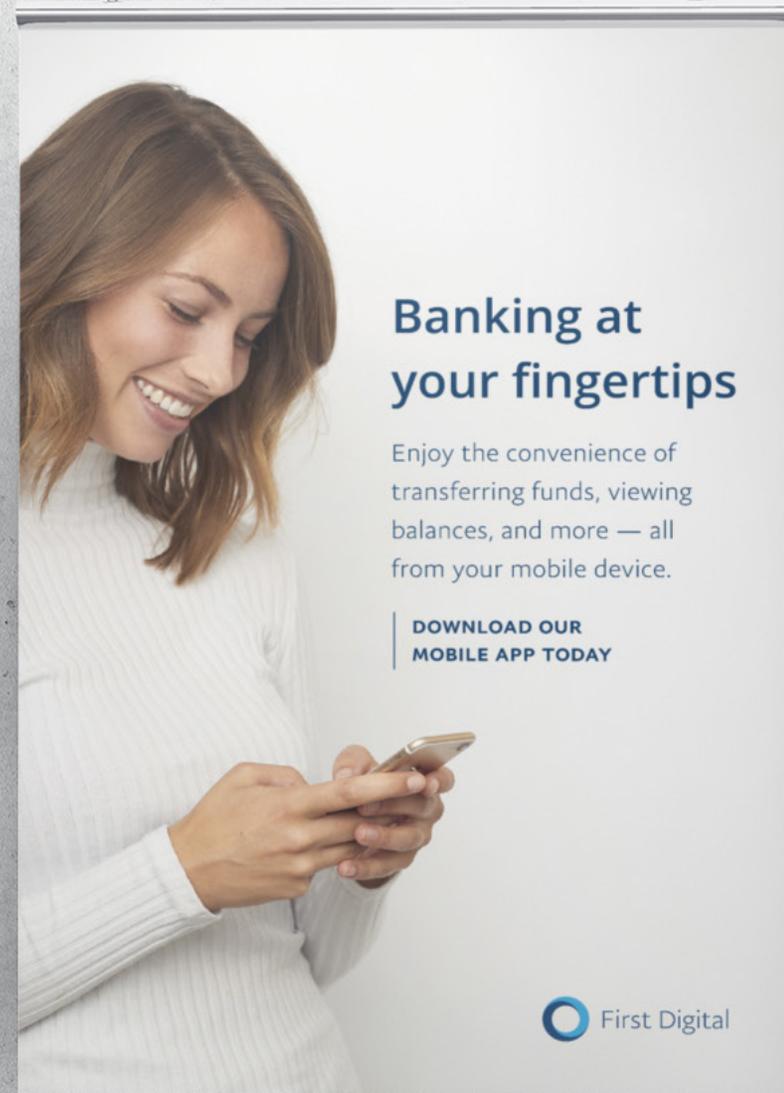
Print is in fact, not dead. Develop print collateral to use in your branch, at events, or to send with paper statements. Include an easy-to-remember call-to-action like your vanity URL, or the app store badges. Consider making your printed assets even more interactive by including a QR code to draw consumers to your dedicated webpage or directly to your app in the app store.

Branch Signage

Every person who walks into your branch should know about your digital banking offerings. Create branch signage that showcases your mobile app or a digital feature like bill pay. Make sure it has a clear call-to-action to download the app or enroll.

In-Branch Education

As your branch employees are having conversations with customers or members, make sure they have printed materials to send with them to learn more. Promote your dedicated product webpage by including a vanity URL, or another clear call-to-action.



Paper Statements & Direct Mail

Many consumers still rely on paper statements each month. Leverage this existing asset as an opportunity to include an insert that promotes your online banking, mobile app, or secure features like online statements. Additionally, if your budget allows, leverage direct mail to target specific segments of your customers or members, with personalized, relevant messaging and offers.



First Digital

Take your bank wherever business takes you.

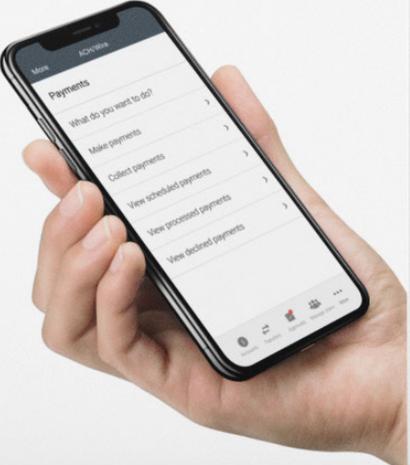
With Business Mobile Banking from First Digital, we give you the financial freedom to manage your business from virtually anywhere.

Seamless and personalized to meet the demands of your business.

- Protect your transactions with Check and ACH Positive Pay exceptions
- Transfer, send, and receive money anytime
- Deposit checks in real time
- Manage approvals for high-risk transactions
- Reduce the risk of fraud with advanced and multi-factor authentication options
- Permit or restrict access to authorized users with entitlements and user access controls

Download the First Digital Business Mobile Banking app today.

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WE'RE HERE TO HELP

Increasing adoption and active use of your digital channels is critical to driving retention, increasing revenue, and achieving a lower cost to serve. But you don't have to do it alone. We're here to help you maximize results and meet your goals.

For more information on our marketing resources, please contact your relationship manager.