

# Harborstone Credit Union Automates and Streamlines New Member Onboarding with the Digital Onboarding Engagement Platform

**August 16, 2021 - Boston, MA—**Harborstone Credit Union a Washington-based financial institution with \$1.8 billion in assets and more than 85,000 members, has selected the Digital Onboarding engagement platform to automate and streamline its new member onboarding journeys so that Money Management Coaches can focus on what they do best - building meaningful relationships.

The Digital Onboarding platform triggers emails and text messages that connect new members with their personalized microsites. The platform's digital, self-service tools make it easy for members to update their direct deposits and adopt digital banking services that drive cost savings, member satisfaction, and longevity.

"The Digital Onboarding platform will do the heavy lifting for our new members by making it easy to adopt digital banking services," said Ken Bloomfield, Vice President of Marketing and Member Experience, Harborstone Credit Union. "We were attracted to the easy-to-use Digital Onboarding platform for its ability to deliver unique experiences in a fun and gamified way. Now, our Money Management Coaches will have more time to build meaningful relationships, members will realize more benefits, and the cooperative will grow from increased engagement."

Harborstone previously welcomed new members with a stream of marketing communications and conversations with Money Management Coaches. By automating its onboarding process and building more consistent and timely new member journeys, the credit union will uncover new and relevant engagement opportunities for its Coaches and members.

“New members need help getting started with using the products they just opened, and credit union staff do not have the time to walk them through every step,” said Ted Brown, CEO, Digital Onboarding. “By adopting the Digital Onboarding platform, Harborstone can give every member a personalized, guided journey while allowing its Money Management Coaches to focus on building meaningful relationships. I am excited to help the credit union achieve its important mission.”

“Harborstone is dedicated to offering the right products and services to help every member become financially empowered,” said Nicole Elliott, Vice President Member Experience and User Experience Innovation, Harborstone Credit Union. “Building relationships requires ongoing communication, tools, and resources that instill knowledge and confidence. The Digital Onboarding platform is integral to helping Harborstone achieve its mission.”

### **About Harborstone Credit Union**

Founded in 1955, Harborstone Credit Union is a Washington State, member-owned financial cooperative, with a history of serving those who serve, and built on the principle of people helping people. At the heart of the credit union are knowledgeable and passionate team members who guide and empower consumer members and business members to make good financial decisions, promoting financial well-being and prosperity. Harborstone’s mission is to build trusted and meaningful relationships with members, and to show up, as a fabric of the community, to help those communities THRIVE. Harborstone has \$1.8 billion in assets and more than 85,000 members.

### **About Digital Onboarding Inc.**

DigitalOnboarding, Inc. is a SaaS technology company focused on helping banking customers and credit union Members activate their financial services products. Digital Onboarding provides a fully automated new account activation platform that is more efficient and effective than traditional phone calls, e-mails, direct mail, and print

brochures, driving profit by increasing new customer and Member activation rates. For additional information, visit <https://www.digitalonboarding.com/>.

For Digital Onboarding media inquiries, contact Laurie McLachlan at [laurie@digitalonboarding.com](mailto:laurie@digitalonboarding.com) or (617) 921-2916.