



2 x 2 x 2 Follow-Up Rule

Here is a simple on-boarding guideline for all new customers/members. To succeed in cross-selling services, it is important to keep the conversation going. This can be done through email, phone, direct mail, statement messaging, etc.

Within 2 days:

Mail a thank you card along with a business card, branch address, phone number, hours, contact information, etc.

Within 2 weeks:

Make a phone call to confirm the customer/member has received their debit card, checks, downloaded mobile app, registered for online banking, signed up for billpay, etc.

Within 2 months:

Phone call or email to ensure the customer/member is receiving their statements, payment books, and make sure auto deposits and deductions are working.

Within 1 year:

Phone call or email the customer/member to thank them for their business and inquire if they have any additional financial needs.

Each of the above opportunities provide you an opportunity to invite the customer/member back to the branch to discuss additional products or services that may benefit them.

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