2 x 2 x 2 Follow-Up Rule

A Simple Member Onboarding Guide

Consistent, thoughtful follow-up builds trust and loyalty—and opens doors to future conversations about products and services that can truly help your members.

Within 2 Days:

Send a Thank You

- Mail a handwritten thank-you card.
- Include your business card, branch address, phone number, hours, and any key contact information.
- Let them know how happy you are to have them as part of the credit union family!

Within 2 Weeks:

Check- In

- Make a quick phone call to confirm they received their debit card, checks, and any welcome materials.
- Ask if they've been able to download the mobile app, enroll in online banking, and set up bill pay.
- Offer help with any questions or setup support they might need.

Within 2 Months:

Ensure Everything's Running Smoothly

- Follow up by phone or email to confirm they're receiving their statements or payment books.
- Verify that direct deposits and automatic deductions are functioning properly.
- Ask if there's anything else you can help them with.

Within 1 Year:

Celebrate Their First Year

- Reach out to thank them again for their membership.
- Ask how things are going and whether they have any upcoming financial goals or needs.
- Invite them to stop by the branch to reconnect and explore services that could support with their next steps.

Every Step is an Opportunity

Each of these touchpoints is more than just a follow-up, it's a chance to build relationships, provide value, and invite members to explore services that make a difference in their financial lives.