



How Leaders Credit Union Increased eStatement Signups By 28% in 30 Days

Discover how Leaders Credit Union used targeted in-app messaging, powered by seamless CRM integration, to promote eStatement enrollment directly within their digital banking experience.

SUCCESS STORY

CUSTOMER OVERVIEW



- **Name:** Leaders Credit Union

- **Industry:** Community financial institution / Credit union

- **Size:** \$1.29B in assets; 88,000 members

- **Region:** West Tennessee

- **Digital Priorities:** Digital adoption – particularly increasing eStatement enrollment, cost reduction, and leveraging real-time data to deliver more relevant, timely account holder experiences through simple, scalable solutions



Leaders Credit Union launched an in-app campaign encouraging account holders to enroll in eStatements, powered by real-time data from HubSpot and their core system. The message was delivered directly within the digital experience, making it easy for account holders to take action instantly, while the campaign ran continuously with minimal oversight.

CHALLENGE

Leaders Credit Union needed more account holders to enroll in eStatements to reduce postage costs and improve efficiency. They were looking for a simple, “set-and-forget” way to drive ongoing adoption without adding manual effort for their team.

Three pain points stood out:

Limited Visibility Into Real-Time Account Holder Behavior

Disconnected systems made it difficult to act on timely data and engage account holders when it mattered most.

Manual Campaign Execution

Marketing efforts required ongoing setup and monitoring, reducing scalability and slowing down execution.

Low Adoption of Cost-Saving Digital Services

eStatement enrollment remained an opportunity, with paper-based processes continuing to drive avoidable operational costs.

“Pulsate made it incredibly easy to activate our HubSpot data and deliver the right message at the right moment. Once the campaign was live, it continued to drive results without requiring ongoing effort from our team.”

— Scott Heit
Director of Marketing and Digital Strategy
Leaders Credit Union



SOLUTIONS

Leaders Credit Union implemented an easy, automated approach to engage account holders in-app, using real-time data to promote eStatement enrollment at the right moment.

KEY ELEMENTS:

1. Engagement When and Where They're Banking

Delivered eStatement prompts directly inside the digital banking experience while they were in the banking frame of mind.

2. Real-Time Targeting via HubSpot and Core Data

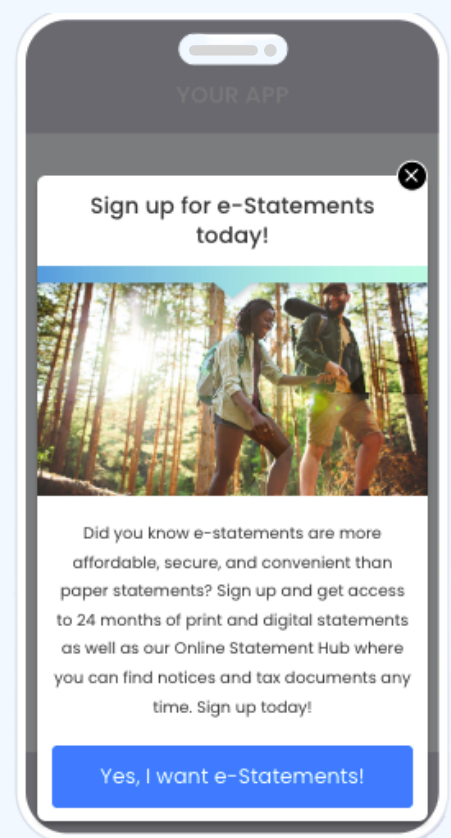
Ensured only relevant account holders received the message.

3. Frictionless Conversion Path

Account holders could enroll immediately without leaving their session.

4. Always-On Campaign Execution

Once live, the campaign continuously drove adoption without manual effort.



Why this worked: By presenting the eStatement enrollment prompt immediately after mobile banking login, Leaders Credit Union met account holders at a moment of high intent. Combined with real-time targeting, this reduced friction and made it easy to act immediately, turning a simple message into measurable adoption and cost savings.

RESULTS

Within 30 days of launching the campaign, Leaders Credit Union saw a measurable shift in digital adoption—demonstrating how targeted, in-app engagement can drive meaningful operational impact. eStatement enrollment increased from 252 to 322 account holders year-over-year, within the same 30-day window, reducing postage costs and creating continued savings as adoption grows.

28% Increase in
eStatement Signups

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70 Additional Enrollments
in **30 Days**

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\$2.6K in **Projected**
Annual Savings

“The impact was immediate. We saw a clear increase in eStatement enrollment, which translated directly into reduced postage costs and a more efficient way to engage our account holders.”

– Scott Heit

Director of Marketing and Digital Strategy
Leaders Credit Union

WHY PULSATE?

Pulsate enables community financial institutions to activate their data, turning insights into real-time, personalized engagement across the mobile experience.



Built for Account Holder–First Engagement

Delivers relevant, timely experiences that drive adoption and usage while deepening relationships.



Secure, Compliant Infrastructure

Designed to meet the highest standards of security for credit unions and community banks.



Real-Time Data Activation

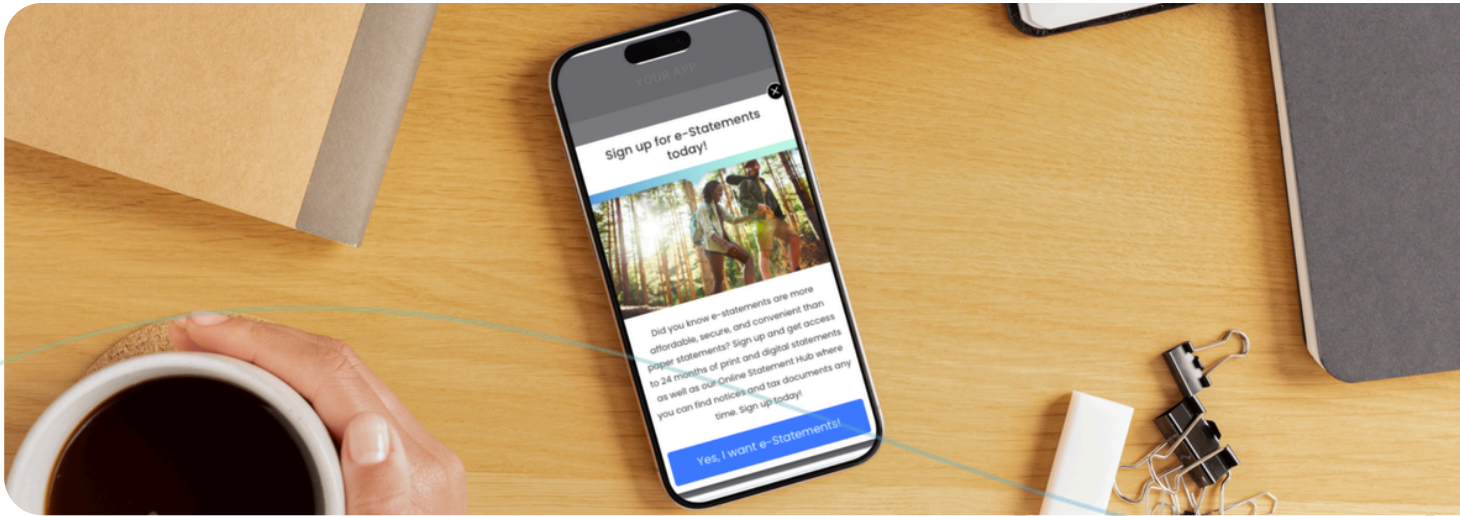
Integrate seamlessly with systems of record and platforms like HubSpot to trigger engagement when it matters most.

See how your credit union can drive measurable impact with less effort.

Book a Pulsate Demo Today



FAQS



How complex is the HubSpot integration?

The integration is designed to be simple and fast to deploy, enabling near real-time data activation with minimal technical overhead.

How much ongoing management is required?

Once configured, campaigns run automatically, allowing teams to benefit from continuous engagement without daily intervention.

Can this approach be used for other use cases?

Yes, this model can be applied across onboarding, product adoption, financial wellness, and more.

How quickly can results be seen?

As demonstrated, measurable impact can be achieved within weeks, depending on the use case and audience size.