

Expert Content Strategy Guide

Bank Onboarding

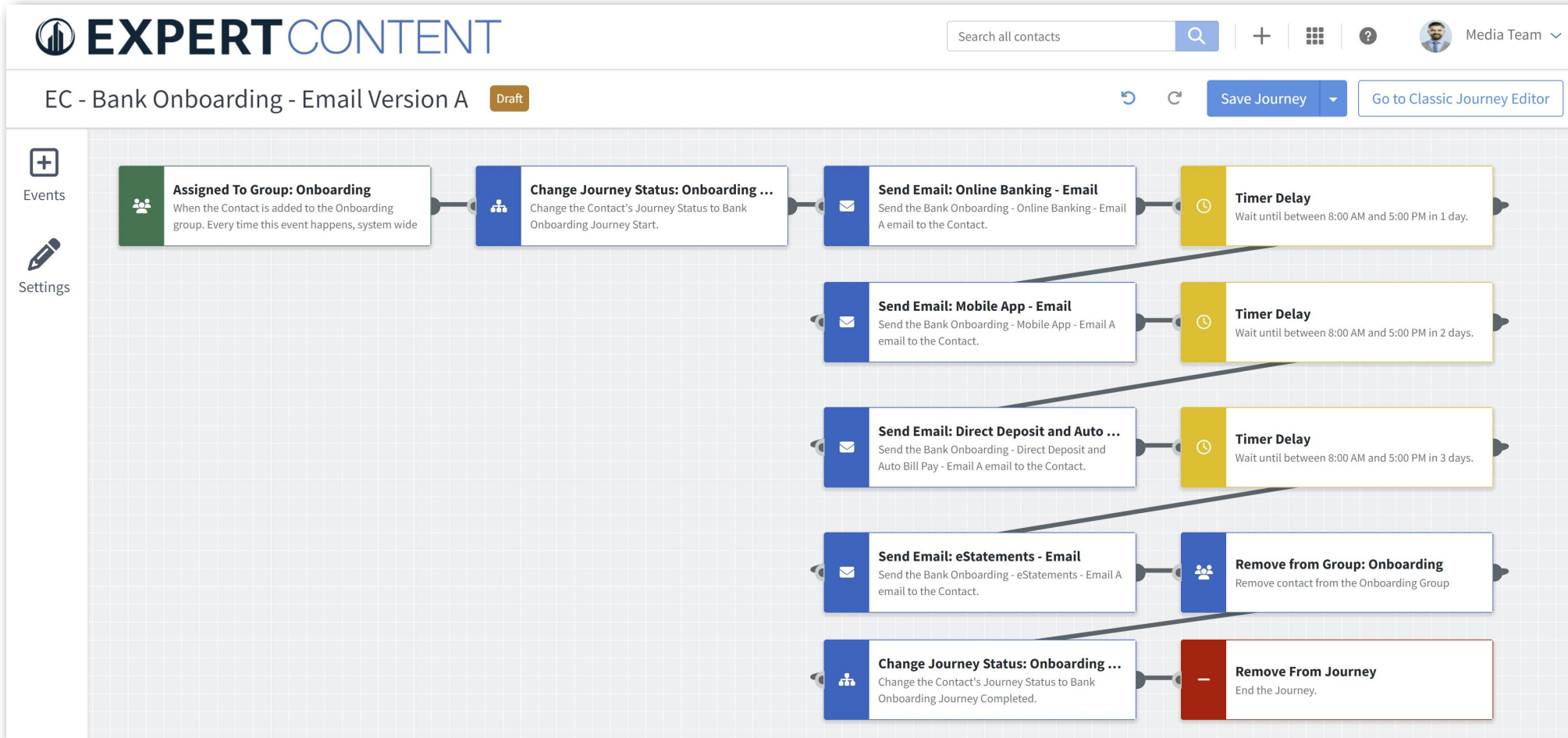


Bank Onboarding

Email or video email series

Four journey versions are provided with variation in look and feel. Each campaign includes emails detailing the benefits of the four following topics: online banking, mobile app, direct-deposit, and eStatements. There are two campaigns that include header images and body copy, and two campaigns include linked videos that describe the same information. Each campaign follows the same wireframe but offers variation in the design and the way information is presented.


*All communications should be reviewed prior to initiating the journey.



Journey Map Notes:

- Contacts created in the past 1 day with a contact group of "Onboarding" will receive a series of 4 emails detailing the benefits of online banking, a mobile app, direct deposit, and eStatements.
- Custom fields can be manually added throughout email content to personalize messaging further.

Bank Onboarding – Email Version A




TAKE CONTROL
enroll in online banking today

Hi Teddy,

Are you ready to take control of your [account type]. See where your money is being spent. Check your balance before making a purchase. Pay those "pesky" bills quickly and easily.

With Online Banking, you're ready to manage your account while sipping your morning coffee.

Enroll in Online Banking today!



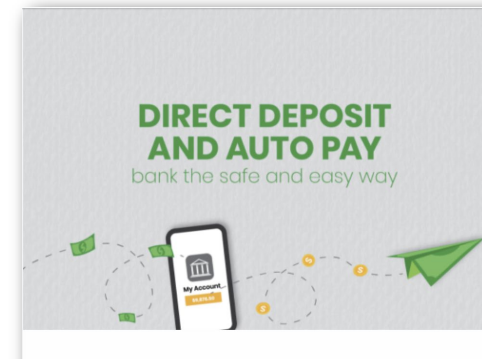
EVERYWHERE BANKING
the mobile app makes life easier

Hi Teddy,

Remember the day when you needed to fill out forms to make an account transfer? Or, using dial-up internet just to check your account balance? Or, stand in line just to deposit a check?

Some things are better left in the past. Our Mobile Banking App helps keep you moving forward while managing your finances, whenever and wherever it's most convenient for you.

Be sure to download the Mobile Banking App, today.



DIRECT DEPOSIT AND AUTO PAY
bank the safe and easy way


Hi Teddy,

Is your [checking account name] ready? It's easy, fast, and safe to have your paycheck deposited electronically. It's convenient to have your monthly bills paid on time with no hassle. This can all be set up to happen automatically so you can focus on everything else in your life.

Automatic payments and direct deposit can help put your account on cruise control. Find out more on how to set them up today.

Remember to use our routing number [Bank_routing_number].
If you have questions, give us a call at [phone_number].

Sincerely,



GO PAPERLESS
turn on eStatements

Hi Teddy,

Paper statements are so 20th century. Why wait for them to arrive by mail? Just login to Online Banking and download your statements each month as a PDF.

eStatements are available securely online and way easier to keep organized!


Turn on eStatements today.

[TURN ON eSTATEMENTS >](#)

Email Subject:

- Bank Onboarding – Online Banking – Email A
- Bank Onboarding – Mobile App – Email A
- Bank Onboarding – Direct Deposit and Auto Bill Pay – Email A
- Bank Onboarding – eStatements – Email A

Bank Onboarding – Email Version B



BANKING AT YOUR FINGERTIPS

Take control and enroll in online banking

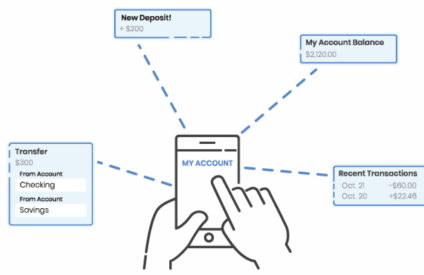
Hi Teddy,

With online banking you can know when your paycheck hits your account. Check your balance before making a purchase. Pay those "pesky" bills quickly and easily.

If you're ready to manage your account right from your sofa, activate online banking today!

BANKING WHEREVER YOU ARE

Our mobile app makes life easier



Transfer
\$100
From Account
Checking
From Account
Savings

New Deposit!
\$250

My Account Balance
\$2,000.00


Recent Transactions
Oct. 21 -\$80.00
Oct. 20 +\$22.45

Hi Teddy,

If dinosaurs had social media, they'd probably be on Twitter. If cavemen had WiFi, they'd probably order pizza. If Benjamin Franklin had Alexa, he'd probably ask her the weather.

Take advantage of what you've got. Technology has evolved to make things easier for us. Mobile Banking is the modern way to manage your money.

Be sure to download the Mobile Banking App, today!



MOVE MONEY WITHOUT LIFTING A FINGER

With direct deposit and auto pay

Hi Teddy,

You rely on your [account type]. You need a place for your paycheck. You need a place where you can pay monthly bills and have them be sure they arrive on time. This can all be set up to happen automatically so you can relax.


Automatic payments and direct deposit make managing monthly expenses easier. Let us help you set them up today!

Remember to use our routing number [bank routing number].

Sincerely,

KEEP YOUR DESK CLEAN

eStatements are both convenient and secure



Hi Teddy,

Avoid the clutter and save resources by signing up for eStatements. There's no paper, envelopes, or old school delivery required needed.

Your statements are available in Online Banking. Download them when -- and if -- you need them!

Log in and turn on eStatements!

[TURN ON eSTATEMENTS >](#)

Email Subject:

- Bank Onboarding – Online Banking – Email B
- Bank Onboarding – Mobile App – Email B
- Bank Onboarding – Direct Deposit and Auto Bill Pay – Email B
- Bank Onboarding – eStatements – Email B