

# Expert Content Strategy Guide

*Savings Cross Sell*

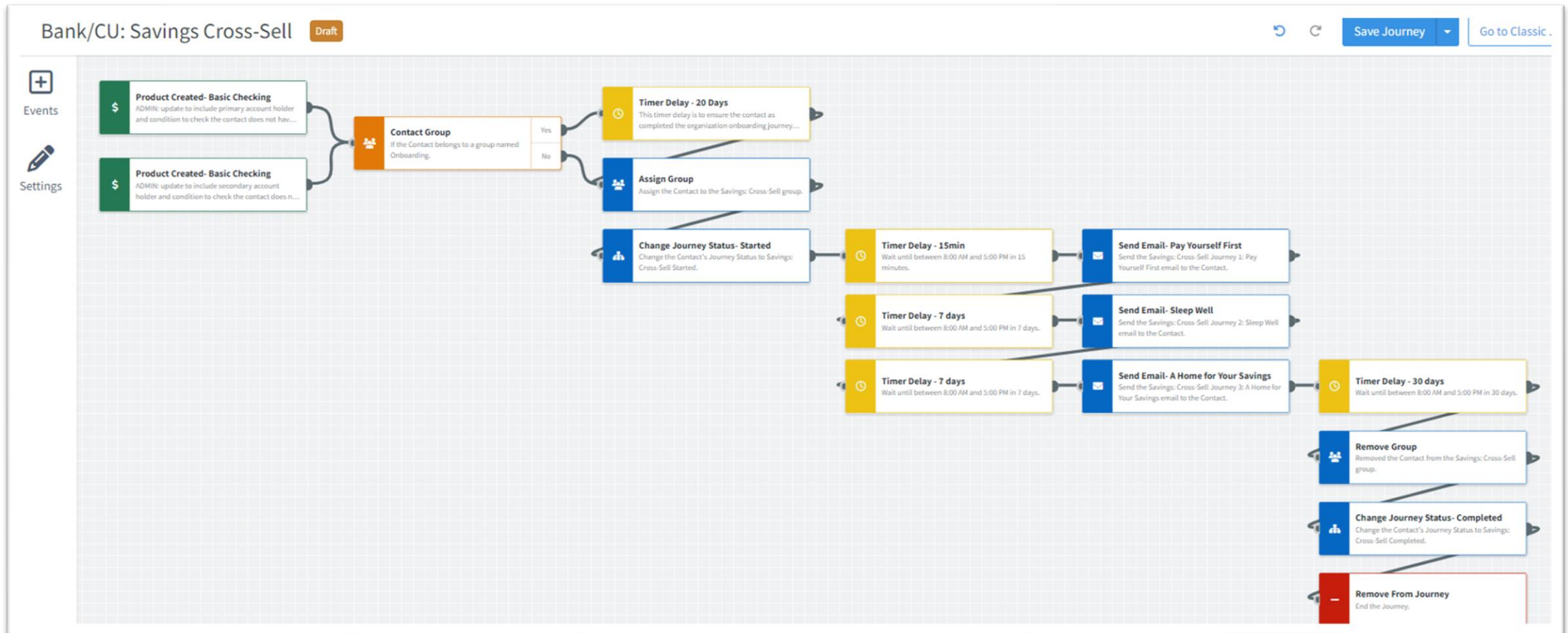


# Savings Cross Sell

## Emails only

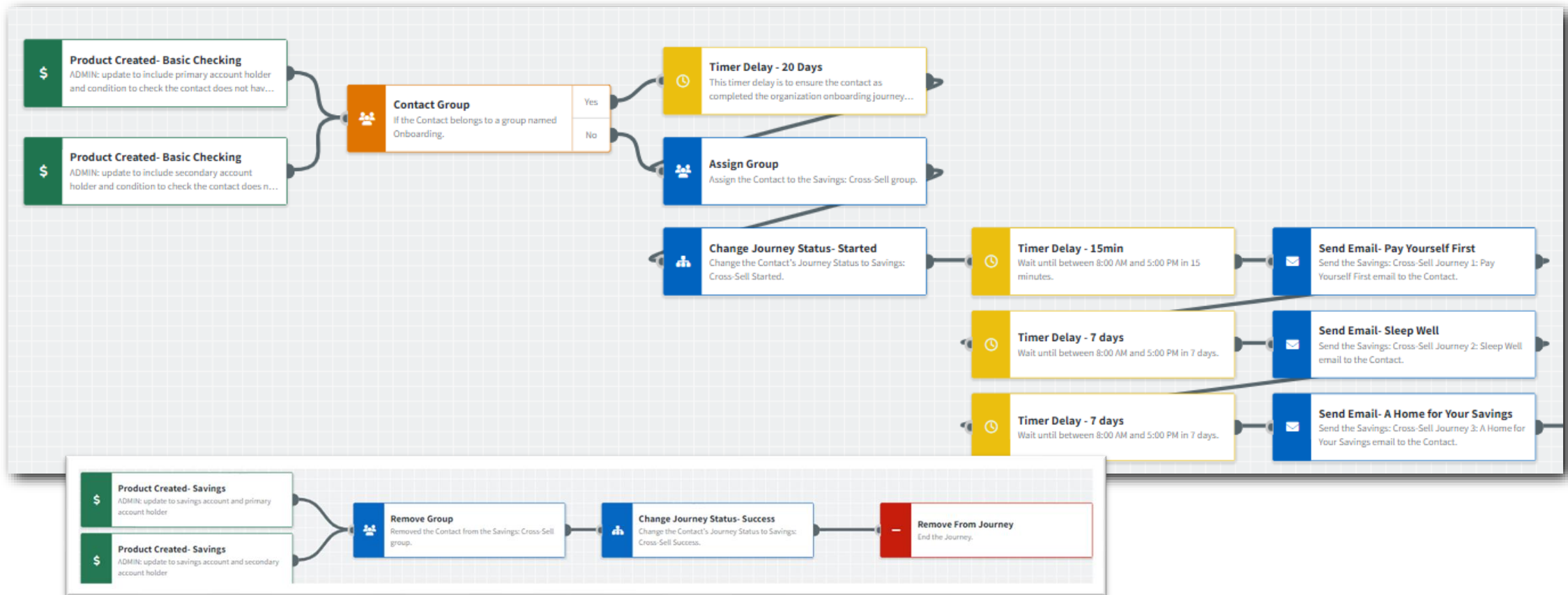
Journey wireframe onramps contacts after a new checking account product is created. Inline trigger conditions limit contacts who already have a savings account. Admins should adjust trigger conditions to include/exclude any sub-product type(s) required for their organization (e.g. include contacts with basic checking and exclude contacts with business checking). Three emails are sent to the contact over 3 weeks educating them on the benefits of a savings account. This journey delays marketing automation for contacts included in an Onboarding group for 20 days to reduce the number of emails they receive during their onboarding period. Timing may be adjusted based on the organizations onboarding journey length.

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



## Journey Map Notes:

- Adjust onramps with organization specific product types – e.g. basic checking or student checking and no savings account.
- Emails may be used as-is or adjusted/replaced to meet the organization's goals.



## Journey Map Notes:

- Contacts are added to the journey based on a new checking account product (can be modified by admins to include or exclude specific checking account types).
- Contacts are removed from the journey after a savings product is created or when the email communications are complete.

# Savings Cross Sell



Dear {{recipient\_f.name}},

When you have bills to pay, the idea of diverting dollars into savings can be daunting. The good news is, you don't need big numbers out of the gate to build a substantial nest egg over time. Creating a savings account with small, regular, automatic deposits can help create the habit of paying yourself first.

We appreciate your business and your trust and want to continue serving you. Contact us today so we can continue to work together to maximize your earnings.

Best regards,



Dear {{recipient\_f.name}},

Looking to reduce your anxiety and sleep better? Creating an emergency savings account could help. Manage your late night financial worries by opening an emergency fund for unexpected expenses or income changes. A dedicated savings account could be a step towards better sleep.

We appreciate your business and want to continue serving you. Contact us today for support with creating a savings plan.

Best regards,



Dear {{recipient\_f.name}},

Savings goals can be as diverse as the people who set them. Whether you're putting aside funds for a purchase, tropical vacation, or new investment, there's a lot to consider when choosing a home for your hard-earned cash.

Let us help you find a savings plan that fits your goals.

We appreciate your business and want to continue serving you. Contact us today for assistance with opening a savings account.

Best regards,

## Email Subject:

- Pay yourself first - your future will thank you.
- Sleep well with an established emergency fund
- A Home for Your Savings