

Expert Content Strategy Guide

Stair Stepping Cross Sell



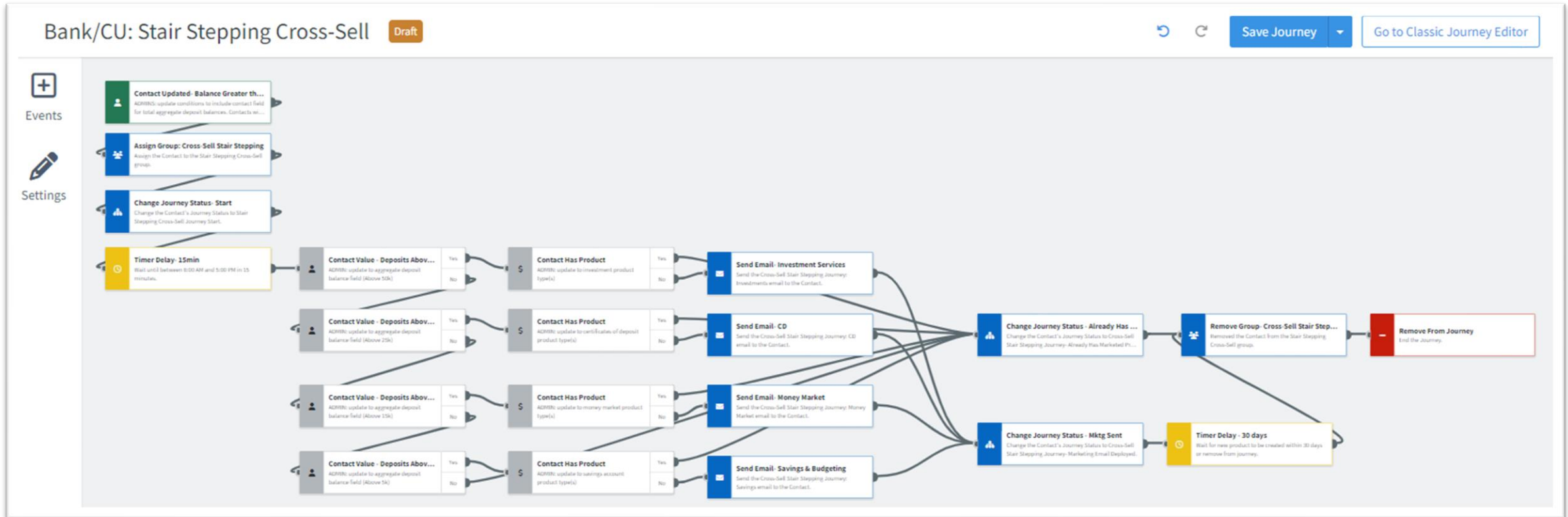
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Emails only

Journey wireframe onramps contacts over \$5k in total deposit balance and further identifies relevant products to four separate thresholds of total deposit balance. Admins will need to confirm contact-level field that aggregates total deposit account balances. This is used to trigger and segment the contacts through the journey. Admins can use the thresholds and associated products as-is or adjust based on their organization's needs.

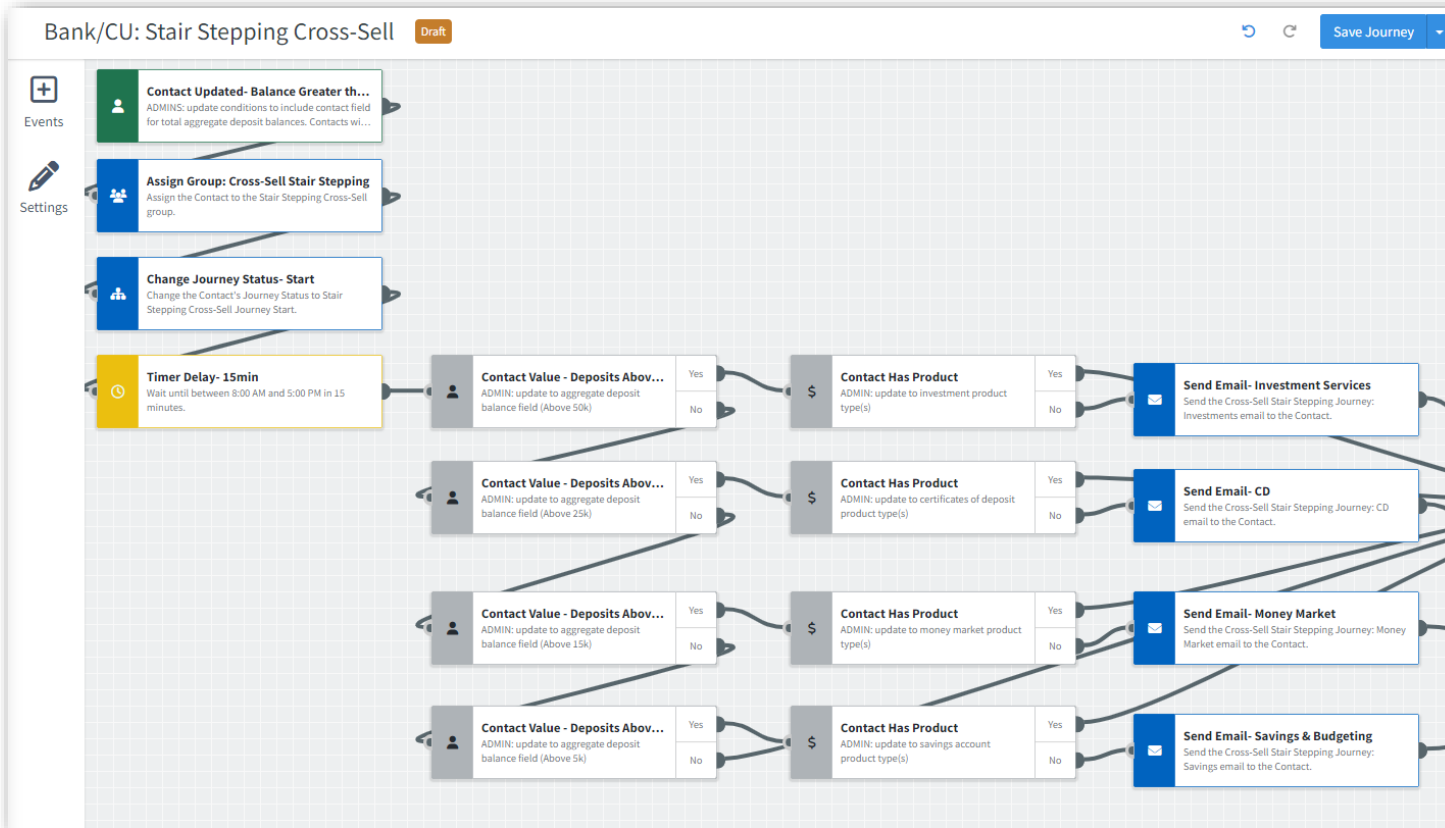
- \$50k+ balance: investment products
- \$25k+ balance: certificate of deposits
- \$15k+ balance: money market accounts
- \$5k+ balance: savings and budgeting products

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



Journey Map Notes:

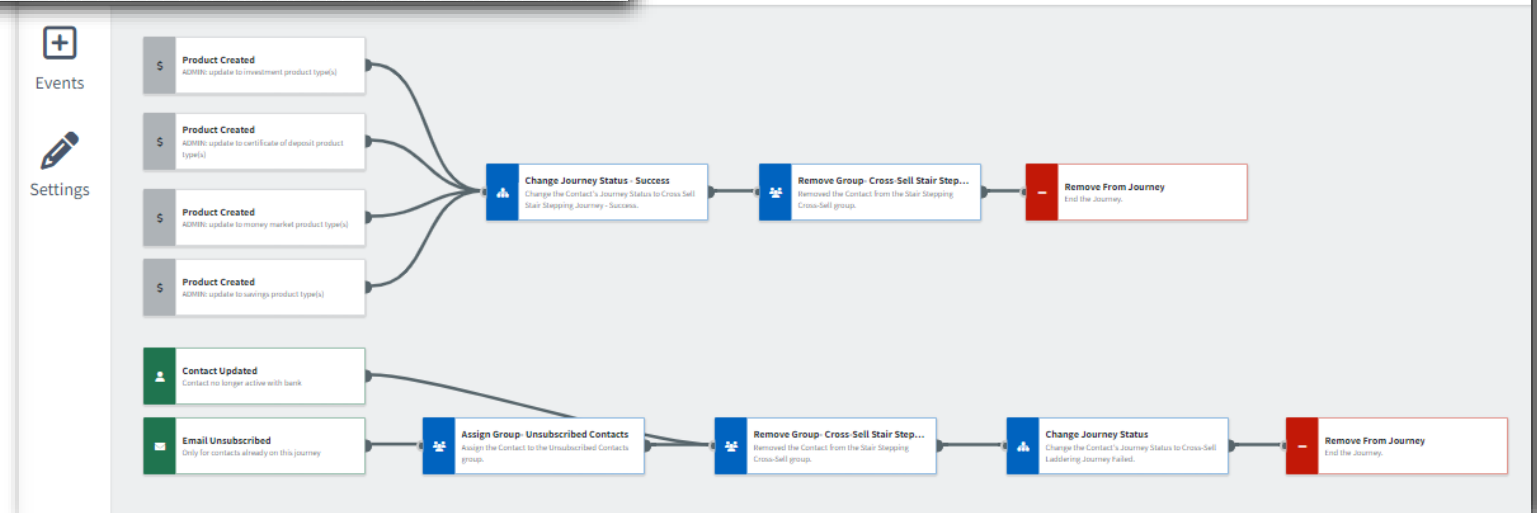
- Adjust onramps with organization specific contact fields leveraging an aggregate deposit balance field.
- Contacts at each account balance level receive an automated email with a relevant product for their balance. Admins can adjust the balance thresholds or related products that best fit their organization.




Journey Map Notes:

- Contacts are added to the journey based on an update to their total account balance (over \$5k) and further segmented by threshold to market specific products.

- Contacts are removed if they've created one of the four marketed products or already have all four. Contacts will remain on the journey after a marketed email is sent for 30 days. If no product created within that waiting period, they are removed.



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Dear {{recipient.f_name}},

If your savings are in a traditional account, chances are they're not pulling their weight. Transferring some or all of your savings into more profitable account types could earn you a considerably higher interest rate.

You might also consider a consultation with our advisor group on premium investment opportunities you have as a trusted partner of Expert Content. Let us help you create maximum returns with minimal effort.

Let's talk today about increasing your savings through investments.



Dear {{recipient.f_name}},


Want your savings to work harder? Move them into a Certificate of Deposit (CD).

A CD is a safe, effective strategy for your money as it offers a higher interest rate than traditional savings accounts.

Since we offer a range of CD terms, you can customize your savings by opening several CDs with different terms. This is called "laddering". For example, you can plan to finance a future event by opening a CD that will mature just before it arrives.

Whether you're planning for retirement or checking out smarter ways to save, a CD can help you achieve these goals.

Contact your banker today to learn more about our CD products.




Dear {{recipient.f_name}},

Are you looking for a low-risk way to grow your savings while still having access to your funds? A Money Market account could be the answer.

Money Market accounts get a higher dividend rate than a traditional savings account. Unlike other savings options, you still have easy access to your money without being locked into a term. It's the perfect way to save.

Let's talk about your options today, so you'll be sure your hard-earned savings are returning the favor.



Dear {{recipient.f_name}},

Are you on track for your financial goals? That question is really just another way of asking if you are on track for your life goals. Budgeting and saving can be a great way for you to have the certainty that your goals will become reality.

We offer a range of savings accounts to start your journey. Whether you're looking to save for a purchase, build emergency funds, or some other life experience, we offer tools that will help you save smarter.

Contact your banker today to learn more about our savings products and budgeting tools.

Email Subject:

- If your savings are snoozing in a low-interest account, let's wake them up.
- Your savings will work harder as a Certificate of Deposit (CD).
- Low risk growth with access to your funds - a win-win!
- Lay the foundation for your financial success.