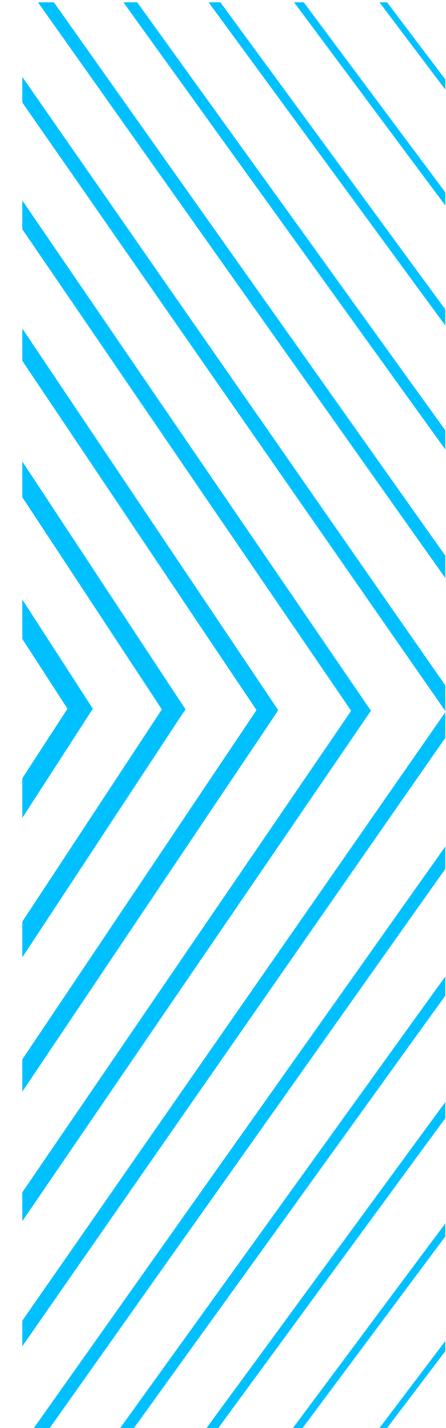




Content Strategy Impact SVB Cards' Business

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Cards' Business Overview

- The Cards' Design Team is focused on designing a variety of digital flows that empower clients to self-service in SVB Go (Order a Card, Dispute a Transaction, Report Fraud, etc.) and reduce Call Center volume
- The addition of a Content Strategist has improved the messaging, brand voice alignment and Design System adherence to create a higher-quality, more consistent digital experience for clients

Content Strategy Progression in the Cards' Business

Past

- Copy wasn't written by a professional writer or a Content Strategist
- Copy increased cognitive load
- Copy was often long and contained spelling/punctuation errors and poor grammar
- Copy wasn't focused on creating a positive client experience

Current

- Copy is written by a Content Strategist
- Copy is as short as possible to lighten cognitive load
- SVB's Style Guide, Design System and Brand Voice are all incorporated consistently into copy
- The recently updated Cards' digital flows have a consistent, on-brand voice to create a higher quality client experience

Current and into the Future

- PMs appreciate the value of clear, concise, on-brand copy
- Digital flows are easier to navigate and speak directly to SVB clients
- The content clearly sets expectations for what's required and what will happen next with guidance copy where needed
- UX needs a stronger partnership with Legal and the opportunity to explain content decisions
- Content Strategy is still new to the team and there are many areas that require attention

Order a Card Flow: Physical Card

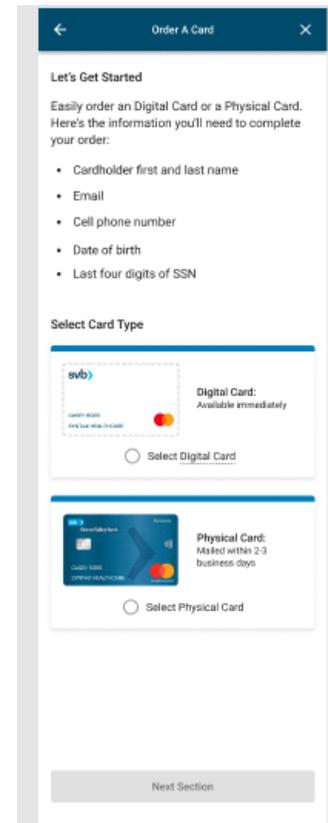
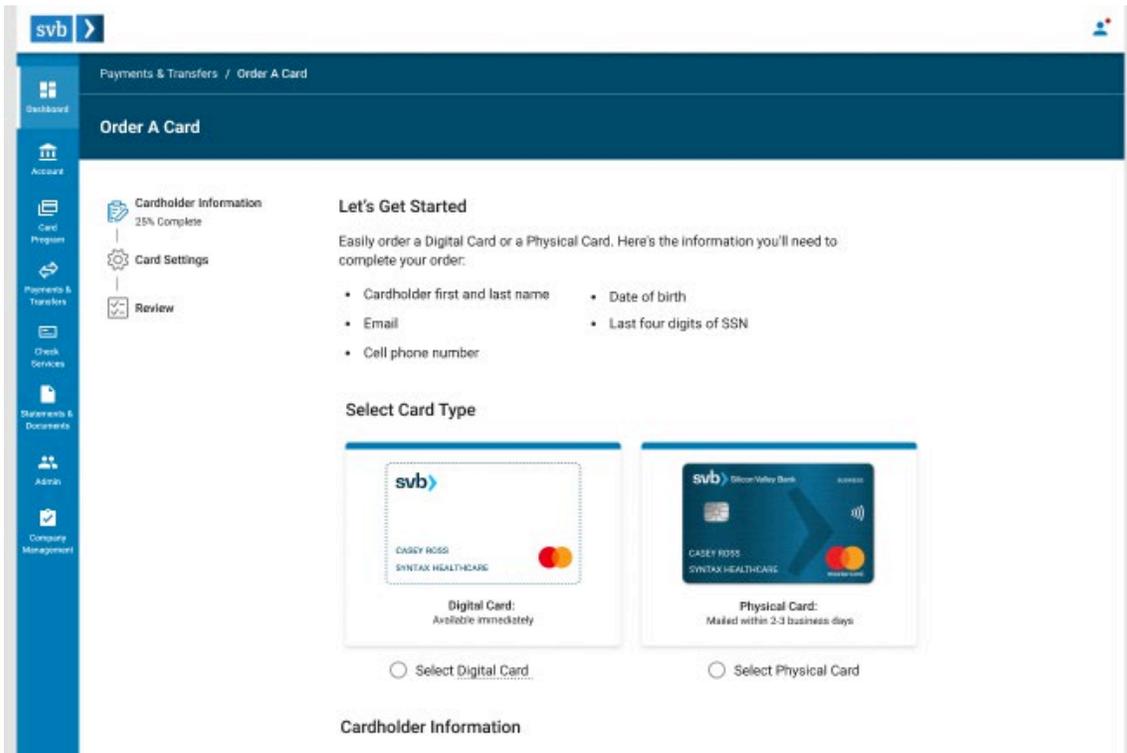
- BEFORE Content Strategy

The screenshot shows the 'Order a Card' page on the Silicon Valley Bank (svb) website. The page has a blue sidebar on the left with navigation links: Dashboard, Account, Card Program, Payments & Transfers, and Statements & Documents. The main content area is titled 'Order a Card' and includes a progress indicator for 'Cardholder Information' (Complete), 'Card Settings' (50% Complete), 'Shipping Information', and 'Review'. Below the progress indicator, there is a list of required information: First and Last Name, Date of Birth, Email, Last Four Digits of SSN, and Cell Phone. At the bottom, there is a preview of a blue SVB Business Mastercard with the text 'EMPLOYEE NAME SYNTAX HEALTHCARE' and the Mastercard logo.

- Order a Card is repeated
- Guidance copy feels awkward
- No brand voice or welcome

Order a Card Flow: Expanded to Physical and Digital Cards

- AFTER Content Strategy



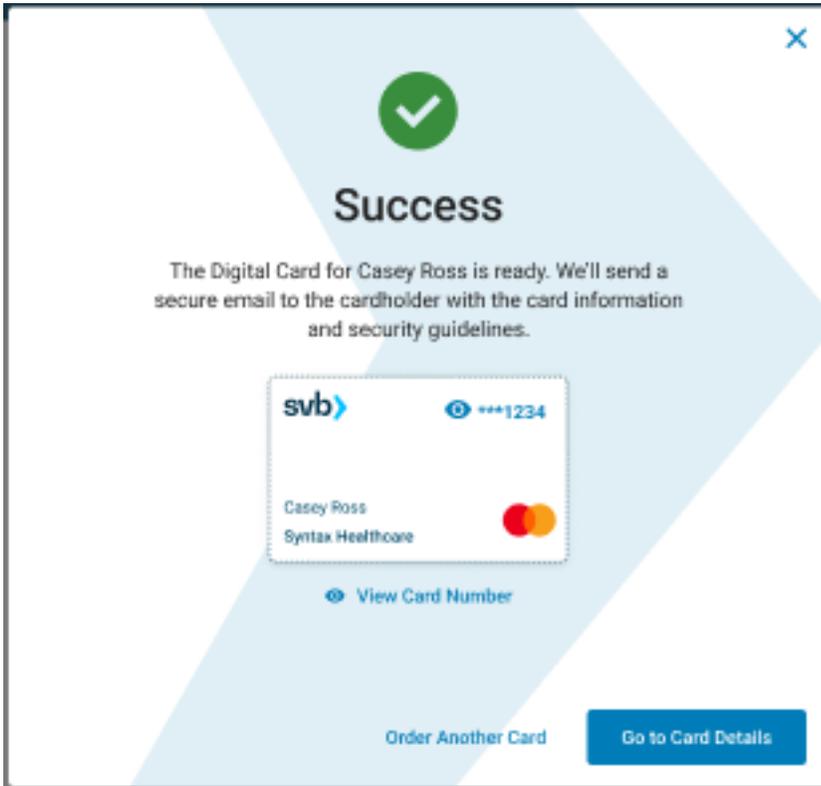
- Add brand voice
- Orient clients with welcoming header: Let's Get Started
- Short guidance copy
- Clear list of what's needed to complete an order
- Clear labels for card types
- Mobile-first approach to copy

Content Strategy: Layered and Strategic Messaging

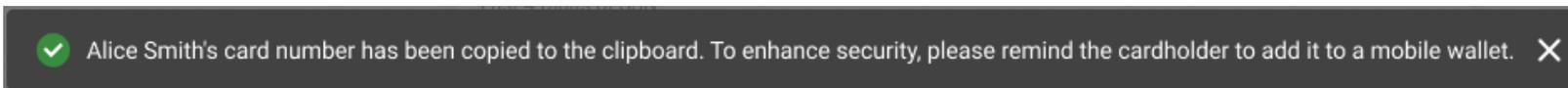
- What's the most important information to convey to clients?
- Create this message with succinct, on-brand copy
- Layer the messaging strategically and in different locations to drive beneficial behavior and reinforce what's most important for clients to do or know
- Let's review an example on the next screen

Order a Card: Digital Confirmation Screen

- AFTER Content Strategy



- Clear Success message
- Card number is shown by selecting View Card Number (MFA required in flow)
- Snackbar appears to acknowledge Admin action and reinforce security guidelines
- CTAs take clients to most common destination and drive additional card orders
- Email to cardholder contains security guidelines for safe handling of Digital Card numbers (reduces risk for SVB)



← Snackbar

Order a Card: Digital Cardholder Email

- AFTER Content Strategy

Please Review Your Digital Card



Vidisha Digital, your Gw Cb Charge Test Digital Card is ready.

Digital Card : 5104 4680 0054 1063
Expiration Date: 11/25
CVV: 446

Address on File:
3003 Tasman Drive
Santa Clara, CA 95054

We're excited for you to get started by enrolling your new card. If you have an SVB Online Banking account, we'll quickly confirm your identity and enroll your new card. If you don't have an account yet, simply enroll your card and create an online account.

[Enroll Your Card](#)

Also, please follow these guidelines with your new Digital Card:

- Add the new card number to a mobile wallet
- Don't write down the card number
- Don't share the card number with others

Regards,
Your SVB Card Services Team

Questions or comments? Please feel free to contact us:

Card Services
1.866.553.3481
001.408.654.1039 International
cardservices@svb.com

- New Digital Card number is securely emailed to cardholders
- Guidance copy encourages enrolling new card in SVB Go
- Security guidelines are included to reinforce safe handling of Digital Card numbers
- SVB Card Services contact information is available *in* the email, replacing a link to SVB.com

Cards' Digital Flows: Complete and In-flight Designs

| Project | Benefits | Status |
|------------------------------------|--|-----------|
| Order a Card: Digital Cards | Allows instant issuance of Digital Card numbers. Creates a competitive advantage for SVB. | Complete |
| Order a Card UK | Allows UK clients to order a Physical Card. Content is being customized for the UK audience. | Complete |
| Dispute a Transaction | Allows clients to dispute transactions in SVB Go rather than calling SVB Card Services. Copy was greatly reduced to be scannable and allow clients to move through the flow quickly. | Complete |
| Report Card Lost/Stolen | Allows clients to report cards lost or stolen in SVB Go. | Complete |
| T&E Emburse White-Label Experience | Provides T&E to all cardholders and allows Admins to enroll non-cardholders as well. T&E creates a competitive advantage as most clients want and need this service. | In-flight |
| Expanded Spend Controls | Allows spend controls to be set daily, weekly and monthly. Transactions can be limited to specific industries and types of transactions. | In-flight |
| Transaction Categorization | Allows clients to categorize transactions in advance to speed up closing their books at the end of the month. | In-flight |

Thank you.