



# Partner Onboarding Automation Strategy

**OCTOBER 19, 2020**

# Introduction

The following presentation provides a snapshot of the messaging, content, structure, design, and sequence for a new Zelle® Partner Marketing onboarding program. This guide should serve as a **strategic outline for the first 13 months of engaging a new partner relationship** via email and the primary partner marketing resource: the Partner Portal.

Our overall goal in the development of an onboarding strategy is to **ensure new partner FIs engage with the Partner Portal, prepare for the launch of Zelle in their organization, and leverage the wide array of assets available to them via the Portal**. This new program should not only increase the entry and usage of the Portal but strengthen the consistency of marketing *Zelle* in the first year after implementation and beyond.

The presentation includes a chart showing the sequence of emails, individual outlines for each communication, and new design templates for the first two emails (via Drupal and Pardot).

# Key Performance Indicators

## PORTAL ENGAGEMENT

- Increased pull-through of decision-making contacts.
- Increased requests for new contacts, expanding the Partner Marketing contact universe.

## PARDOT ENGAGEMENT

- Increased contact engagement with email marketing.
- Raise open rates by 5% (from average of ~21% today), indicating stronger contact lists and improved loyalty as a result of proper onboarding.
- Raise CTOR by 5% (from ~15% today) indicating more engagement with *Zelle* email content.

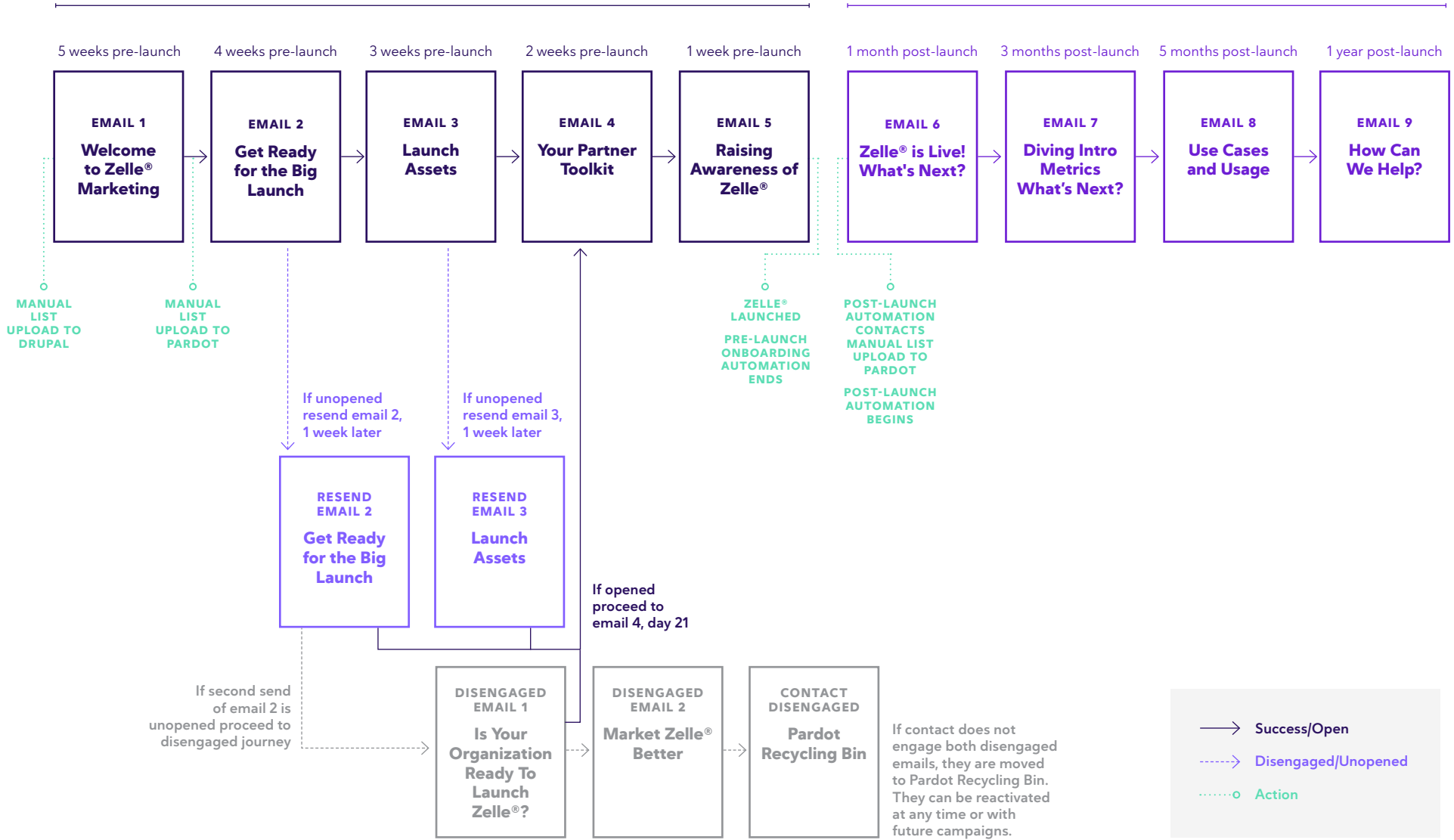
## ASSET DOWNLOADS

- Increased asset downloads across all key marketing asset categories.
- Deepened engagement with more advanced assets.

# Partner Onboarding Journey

PRE-LAUNCH ONBOARDING AUTOMATION

POST-LAUNCH AUTOMATION



# Onboarding Strategy & Content

EMAIL 1

Welcome to  
Zelle<sup>®</sup> Marketing



**EMAIL 1**

# Welcome to Zelle® Marketing

## STRATEGY

The first touch assumes a client is 4-6 weeks from the launch of *Zelle* within their FI. Its primary goal is to drive the user into the Partner Portal with new login information and set expectations for what they'll see.

## GOALS

Drive user to complete login setup, watch *Zelle* Portal Demo Video, and explore initial Partner Portal actions.

## KEY MESSAGES

Summarize what the Portal contains and focus on a login to the Partner Portal.



### Marketing Automation Tool

Drupal



### Pre-Send Actions

Manual List Upload to Drupal



### Post-Send Actions

Successful Customer Authentication

## EMAIL 1

# Welcome to Zelle<sup>®</sup> Marketing

## CRITICAL CONTENT

The first onboarding email will contain critical login information that includes the following:

- Your partner marketing team at *Zelle* has created an account for you
- You can activate your account with a unique link generated for you
- After setting your password, you will be able to login at [partners.zellepay.com](https://partners.zellepay.com)

Note: The account activation link may only be used once and will expire after one day.

## SECONDARY CONTENT

Additional content in the email will include:

- *Zelle* Portal Demo Video callout
- What you'll find in the Partner Portal:
  - How to market *Zelle*
  - Getting started for launch
  - Approved marketing templates, pre-approved social media posts, photos, and much more

### KEY CTAs

Complete Account Setup ([Link](#))

Standard Portal Link ([Link](#))

Portal Access Request ([Link](#))

EMAIL 2

Get Ready for  
the Big Launch

## EMAIL 2

# Get Ready for the Big Launch

## STRATEGY

The second touch is triggered by the upload of a timestamped list ~1 week after the upload of the same contact set to Drupal. Authentication is **not** a requirement to receive this second email (and subsequent emails along the Partner Marketing Onboarding Journey). The focus is on deepening engagement with the Portal and ensuring initial launch prep is underway.

## GOALS

Drive user to login to the Portal to ensure they have launch requirements completed.

## KEY MESSAGES

Be the brand, a large Portal that makes it easy to walk through your launch priorities. Focus on launch requirements:

- Product Page
- FAQs
- Employee Readiness



### Marketing Automation Tool

Pardot



### Pre-Send Actions

Manual List Upload to Pardot "Zelle Partner Marketing Onboarding."  
All users uploaded.

**EMAIL 2**

# Get Ready for the Big Launch

## PRIMARY CONTENT

Have you prepared your team to launch Zelle®?  
Be sure to login to the Partner Portal and make your launch of *Zelle* a huge success for your organization and its customers.

- Get to know the *Zelle* brand to ensure you build effective, compliant messaging to your customers or members
- Discover new assets in the Partner Toolkit and start creating the three required marketing assets in advance of your launch

## SECONDARY CONTENT

Ensure you are setup for launch with the three pre-launch marketing assets:

- *Zelle* Product Overview Page (need unique url)
- *Zelle* Consumer FAQs developed (need unique url)
- *Zelle* Call Center FAQs developed (need unique url)

**EMAIL 2**

# Get Ready for the Big Launch

**KEY CTAs**

Zelle Style Guide ([Link](#))

Partner Toolkit ([Link](#))

Portal Login and Portal Access  
Request ([Link](#))

**RESOURCE HIGHLIGHT**

Zelle Brand 101 ([Link](#))

**FAST FACT**

Zelle's value propositions are  
Fast, Safe, and Easy.

EMAIL 3

# Launch Assets

## EMAIL 3

# Launch Assets

## STRATEGY

We now shift into marketing launch preparation and focus on the various aspects of how a marketer successfully launches *Zelle* in this short window, while also reassuring them that they can build for the long term marketing of *Zelle* also.

## GOALS

Drive user to login to the Partner Portal to ensure they have launch requirements completed and direct them to the baseline assets to help streamline their launch requirements.

## KEY MESSAGES

- A treasure trove of assets to make your marketing responsibilities easier.
- Introducing *Zelle* in a variety of ways



### Marketing Automation Tool

Pardot



### Actions

Automated in Pardot



**EMAIL 3**

# Launch Assets

## PRIMARY CONTENT

Make your Zelle® marketing launch Easy!

Hop into the Partner Toolkit (Click on Partner Toolkit in the navigation bar above to access the materials.)

The Partner Toolkit is home to all your *Zelle* marketing materials, assets and campaign guides. Here's where you can download assets, customize materials for your financial institution, and learn more about available campaigns that you can quickly leverage in your markets.

- Launch setup essentials  
(The four pre-launch marketing assets)
- Use templates and pre-made assets in the Partner Toolkit

## SECONDARY CONTENT

Many of your customers will experience *Zelle* for the first time. So, an introduction is very important.

We created an Introducing *Zelle* guide to help you connect your customers what *Zelle* is and where to find it. Where do you find it?

1. Login to the Partner Portal
2. Click "Partner Toolkit" in the top navigation bar
3. Click "By Objective"
4. Click "Awareness"
5. Click "Introducing *Zelle*"

**EMAIL 3**

# Launch Assets

**KEY CTAs**

Partner Portal

Zelle Partner Shop ([Link](#))

Portal Login and Portal Access Request ([Link](#))

**RESOURCE HIGHLIGHT**

Grab some *Zelle* swag for your team ([Link](#))

**FAST FACT**

The average human being now has an attention span of eight seconds. How do you make your marketing memorable?

Source: <https://www.cision.com/us/2018/01/declining-attention-killing-content-marketing-strategy/>

EMAIL 4

# Your Partner Toolkit

**EMAIL 4**

# Your Partner Toolkit

**STRATEGY**

Focus turns to the Partner Toolkit more closely and sets the stage for awareness generation.

**GOALS**

Partner Toolkit asset downloads, submissions

**KEY MESSAGES**

- Start creating Introducing *Zelle* assets that set you up for year long success
- Define specific assets that help you meet specific goals



**Marketing Automation Tool**

Pardot



**Actions**

Automated in Pardot

**EMAIL 4**

# Your Partner Toolkit

## PRIMARY CONTENT

Find marketing assets that make it easier for you to launch Zelle® in-branch and online.

We created the Partner Toolkit just for you.

- Click on the “Partner Toolkit” link in the upper navigation in our Partner Portal and you’ll be able to quickly search for assets that meet your needs
- If you aren’t sure where to start, we’ve got you covered. Search by “Objective” and click through to specific campaigns tailored to generate awareness and usage of *Zelle*
- Assets you’ll find in the Partner Toolkit include display ads, in-branch posters, email templates, employee communications, social media, photos and much more

## SECONDARY CONTENT

Make your customers aware of *Zelle* and its benefits after launch.

Each of your customers comes with a unique set of habits and attitudes about technology, and each customer goes about living and banking in their own way. That’s why it’s important to utilize as many types of assets and delivery channels as possible.

The Introducing *Zelle* toolkit contains templates for the digital and print assets you’ll use to spread the word about *Zelle*. Messaging focuses on the key benefits of *Zelle* – fast, safe, easy and free\* (if applicable).

EMAIL 4

# Your Partner Toolkit

## KEY CTAs

Partner Portal

Portal Login and Portal Access Request ([Link](#))

## RESOURCE HIGHLIGHT

**Get Social.** Start by downloading the 4 themes found in the “Social Media Approved Copy” document from the Introducing *Zelle* toolkit for guidance on how you can drive education and awareness of *Zelle* via your social media channels.

## FAST FACT

We have over 100 royalty-free images that can be paired with the pre-approved social media copy.

These are found in the “Photos & GIFs” quick link in the navigation at the bottom of the Partner Toolkit page

EMAIL 5

# Raising Awareness of Zelle<sup>®</sup>

EMAIL 5

# Raising Awareness of Zelle®

## STRATEGY

At this stage, we are teaching *Zelle* Marketers about awareness generation, specifically external awareness generation, whether they've just launched or are nearing the launch of *Zelle*.

## GOALS

Awareness-focused marketing

## KEY MESSAGES

- Make sure they have all four required assets ready to go live
- Prepare a press release to promote *Zelle* on their website
- Get employees excited about *Zelle*



### Marketing Automation Tool

Pardot



### Pre-Send Actions

Automated in Pardot



### Post-Send Actions

*Zelle* Launched - Pre-launch

Onboarding Automation Ends



**EMAIL 5**

# Raising Awareness of Zelle®

## PRIMARY CONTENT

Make your customers aware of *Zelle* and its benefits after launch.

Each of your customers comes with a unique set of habits and attitudes about technology, and each customer goes about living and banking in their own way. That's why it's important to utilize as many types of assets and delivery channels as possible.

The Introducing *Zelle* toolkit contains templates for the digital and print assets you'll use to spread the word about *Zelle*. Messaging focuses on the key benefits of *Zelle* – fast, safe, easy and free\* (if applicable).

1. Login to the Partner Portal
2. Click "Partner Toolkit" in the top navigation bar
3. Click "By Objective"
4. Click "Awareness"
5. Click "Introducing *Zelle*"

## SECONDARY CONTENT

Every year, *Zelle* launches a national advertising campaign that focuses on driving deeper awareness of *Zelle*. FIs are encouraged to participate in the campaign during defined "coordinated moments."

From the Partner Toolkit home page, click "By Product," "P2P," then click on the name of this year's campaign.

EMAIL 5

# Raising Awareness of Zelle®

## KEY CTAs

Partner Portal

Portal Login and Portal Access Request ([Link](#))

## RESOURCE HIGHLIGHT

**Email:** The Introducing *Zelle* toolkit contains two "Intro Email" templates. Both templates have multiple hero images to choose from. Change the hero image and subject line for each email to prevent your customers from thinking they're already seen this email and deleting immediately.

## FAST FACT

Mailchimp recommends using no more than 9 words and 60 characters in your email subject lines.

And don't forget the *Zelle* Partner Toolkit includes pre-approved subject lines.

Source: <https://mailchimp.com/help/best-practices-for-email-subject-lines/>

EMAIL 6

Zelle<sup>®</sup> is Live!  
What's Next?

**EMAIL 6**

# Zelle<sup>®</sup> is Live! What's Next?

## STRATEGY

This juncture assumes enough time has passed that the client has officially launch *Zelle*. The focus shifts to more advanced, longer term marketing including tactics to drive *Zelle* Enrollment and First Use.

## GOALS

Downloaded assets for Enrollment and First Use Campaigns

## KEY MESSAGES

- Confirm Introducing *Zelle* campaign is running
- Promote preparation for next specialty campaigns (Enroll, First Use and P2P Payment)



### Marketing Automation Tool

Pardot



### Pre-Launch Actions

*Zelle* Launched - Post-launch Automation Begins

Manual List Upload to Pardot  
"Post-Launch Automation Contacts."

**EMAIL 6**

# Zelle<sup>®</sup> is Live! What's Next?

## PRIMARY CONTENT

Start thinking ahead to how your customers will adopt and use Zelle<sup>®</sup>.

Define Enrollment and First Use.

All Enrollment and First Use assets can be found in the Partner Portal.

1. Click "Partner Toolkit" in the top navigation bar
2. Click "By Objective"
3. Click "Enrollment"
4. Click "Enrollment and First Use"

## SECONDARY CONTENT

### Send an Enrollment Email:

Have mobile or online banking customers who have not enrolled with *Zelle* yet?

Customize the "Enrollment" email template and download the pre-approved subject lines document. Set up the call to action (CTA) to deep link to your *Zelle* experience on your website or mobile app or as close as you can get the user to the "Send Money with Zelle<sup>®</sup>" experience. For the follow-up email, customize and download the "Enrollment" email again but select a different headline, image and subject line.

EMAIL 6

# Zelle<sup>®</sup> is Live! What's Next?

**KEY CTAs**

Partner Portal

Portal Login and Portal Access  
Request ([Link](#))

**RESOURCE HIGHLIGHT**

**Digital Ads:** Create beautiful display ads and retarget interested customers. (Link?)

**FAST FACT**

Almost half (49%) of new users who send one payment in the first month will still be using *Zelle* 6 months later.

EMAIL 7

# Diving Into Metrics

EMAIL 7

# Diving Into Metrics

## STRATEGY

It's time to start further evaluating the performance of your Zelle® marketing to date. This email will "dive into the metrics," discussing data to review and what to plan for next.

## GOALS

Partner Portal engagement

## KEY MESSAGES

- Data and how to use it
- Most basic, influential data points to begin tracking



### Marketing Automation Tool

Pardot



### Actions

Automated in Pardot



## EMAIL 7

# Diving Into Metrics

## PRIMARY CONTENT

Data is an important driver in the improvement of your customers' experiences. How are you tracking your latest Zelle® marketing initiatives?

Percentage of enrolled customers in *Zelle*?

- Track monthly to see how you're trending towards your enrollment goal

Percentage of active *Zelle* users that have sent or received a payment with *Zelle* in the past 30 or 90 days?

- Track daily or weekly to help measure the success of your marketing assets and campaigns

Number of *Zelle* transactions that are sent per *Zelle* sender in the past 30 or 90 days?

- Track monthly to help assess whether customers are making the switch from cash/checks to *Zelle*

Optional: Customer Satisfaction

- *Zelle* customers rate their bank's brand perception higher than their non-*Zelle* users. How satisfied with *Zelle* are your customers?

## SECONDARY CONTENT

- Improved Targeting
- Targeting Competitor P2P
- Retargeting
- Additional Targeting Opportunities

EMAIL 7

# Diving Into Metrics

## KEY CTAs

Partner Portal

Portal Login and Portal Access Request ([Link](#))

## RESOURCE HIGHLIGHT

**Need a low-cost way to market Zelle?**

Use "[Ask me about Zelle](#)" shirt buttons to spark conversations and provide opportunities to show customers where Zelle is located in your mobile app.

## FAST FACT

48% of Zelle users' first transaction is a "receive" transaction.

54% of those will go on to "send" a payment of their own.

EMAIL 8

# Use Cases and Usage

## EMAIL 8

# Use Cases and Usage

## STRATEGY

Grow. Focus on usage and use cases that help expand your marketing and targeting capability. For launch "laggards," reinforce various channels and resources you can use to advertise and promote Zelle®.

## GOALS

Partner Portal engagement

## KEY MESSAGES

- Discuss increasing usage - "Part 4" of our "How To Market Zelle Guide" includes everything you need to know to develop and execute the Increasing Usage of Zelle campaign
- Review what's been covered through onboarding thus far



### Marketing Automation Tool

Pardot



### Actions

Automated in Pardot

**EMAIL 8**

# Use Cases and Usage

**PRIMARY CONTENT**

If you have gained some traction with your Zelle® marketing programs thus far, it may be time to explore our Increasing Usage campaigns.

Just like the last campaign, the Increasing Usage campaign comes with its own set of assets. We also have seasonal mini-campaigns for times when Zelle transactions tend to increase such as holidays, graduation, and wedding season. We've created customizable email template and social media posts you can use!

Go to the Increasing Usage toolkit to customize new email templates for this campaign. You'll also have access to new social media content. All Increasing Usage assets can be found in the Partner Portal.

1. Click "Partner Toolkit" in the top navigation bar
2. Click "By Objective"
3. Click "Usage"
4. Click "Increasing Usage"

**SECONDARY CONTENT**

A review of what's available:

- "Re-introduce Zelle" if you have not.
- Enroll / First Use / Usage
- Assets (Social, Content, Display Ads, Email Templates)

EMAIL 8

# Use Cases and Usage

## KEY CTAs

Partner Portal

Seasonal Mini-Campaigns

Portal Login and Portal Access

Request ([Link](#))

## RESOURCE HIGHLIGHT

Create beautiful social posts that align with relevant use cases seasonally.

## FAST FACT

Our data shows that the average *Zelle* enrollment (enrollments/active mobile banking) is 10% for FIs that have been part of the *Zelle* Network® for less than 6 months. The top 25% of FIs achieved a 22% enrollment penetration.\* **Can your team make it into the top tier?**

\*Shared Directory and bank contributions in Q1 2020

EMAIL 9

How Can We Help  
For What's Ahead?

EMAIL 9

# How Can We Help For What's Ahead?

## STRATEGY

Assess and Optimize. Survey on year-one post implementation and prep for improving in year 2.

## GOALS

Survey response



### Marketing Automation Tool

Pardot

Survey Tool

Survicate



### Actions

Automated in Pardot

Survey response



**EMAIL 9**

# How Can We Help For What's Ahead?

**PRIMARY CONTENT**

Survey call-to-action. Survey would offer an opportunity for marketing program feedback and also assess where the FI landed after one year of onboarding (e.g. how far did they progress into leveraging *Zelle* assets). The survey should help inform onboarding improvements and additional asset creation or Portal development.

**SECONDARY CONTENT**

A review of what's available:

- "Re-introduce *Zelle*" if you have not.
- Enroll / First Use / Usage
- Assets (Social, Content, Display Ads, Email Templates)

EMAIL 9

# How Can We Help For What's Ahead?

## KEY CTAs

Partner Portal

Portal Login and Portal Access Request ([Link](#))

Link to Survey

## RESOURCE HIGHLIGHT

Grab some *Zelle* swag for your team ([Link](#))

## FAST FACT

Our data shows that the average *Zelle* enrollment penetration (enrollments/active mobile banking) is 17% for FIs that have been part of the *Zelle* Network® for 6-12 months. The top 25% of FIs achieved a 39% enrollment penetration.\*

\*Shared Directory and bank contributions in Q1 2020

DISENGAGED EMAIL 1

Is Your Organization  
Ready To Launch Zelle<sup>®</sup>?

## DISENGAGED EMAIL 1

# Is Your Organization Ready To Launch Zelle®?

**CRITICAL CONTENT**

- Your partner marketing team at Zelle has created an account for you.
- You can login by clicking ([the reset password link](#))
- After setting your password, you will be able to login at [partners.zellepay.com/user](https://partners.zellepay.com/user).

Note: The password reset link may only be used once and will expire after one day.

**SECONDARY CONTENT**

- Zelle Portal Demo Video
- What you'll find in the Zelle Partner Portal:
  - How to market Zelle
  - Getting Started for launch
  - Approved marketing templates, pre-approved social media posts, photos, and much more

**Timing**

If second send of email 2 is not opened, proceed to Disengaged Journey

**Marketing Automation Tool**

Pardot

**Post-Send Actions**

If opened proceed to Email 4

If unopened proceed to Disengaged email 2

DISENGAGED EMAIL 1

# Is Your Organization Ready To Launch Zelle®?

**RESOURCE HIGHLIGHT**

**Get Social.** Start by downloading the four themes found in the “Social Media Approved Copy” document from the Introducing *Zelle* toolkit for guidance on how you can drive education and awareness of *Zelle* via your social media channels.

**FAST FACT**

**Email:** The Introducing *Zelle* toolkit contains two “Intro Email” templates. Both templates have multiple hero images to choose from. Change the hero image and subject line for each email to prevent your customers from thinking they’re already seen this email and deleting immediately.

And don't forget the *Zelle* Partner Toolkit includes pre-approved subject lines.

DIENGAGED EMAIL 2

Market Zelle<sup>®</sup> Better

## DISENGAGED EMAIL 2

# Market Zelle® Better

**CRITICAL CONTENT**

- Your partner marketing team at *Zelle* has created an account for you.
- You can login by clicking ([the reset password link](#))
- After setting your password, you will be able to login at [partners.zellepay.com/user](https://partners.zellepay.com/user).

Note: The password reset link may only be used once and will expire after one day.

**SECONDARY CONTENT**

- *Zelle* Portal Demo Video
- What you'll find in the *Zelle* Partner Portal:
  - How to market *Zelle*
  - Getting Started for launch
  - Approved marketing templates, pre-approved social media posts, photos, and much more

**Timing**

If disengaged email 1 is not opened, proceed to second step of Disengaged Journey

**Marketing Automation Tool**

Pardot

**Post-Send Actions**

If opened proceed to Email 6

If unopened move customer to Pardot Recycling Bin

DISENGAGED EMAIL 2

# Market Zelle® Better

**RESOURCE HIGHLIGHT**

**Get Social.** Start by downloading the four themes found in the “Social Media Approved Copy” document from the Introducing *Zelle* toolkit for guidance on how you can drive education and awareness of *Zelle* via your social media channels.

**FAST FACT**

**Email:** The Introducing *Zelle* toolkit contains two “Intro Email” templates. Both templates have multiple hero images to choose from. Change the hero image and subject line for each email to prevent your customers from thinking they’re already seen this email and deleting immediately.

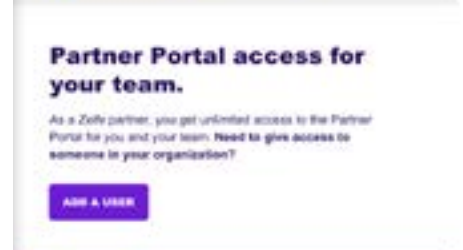
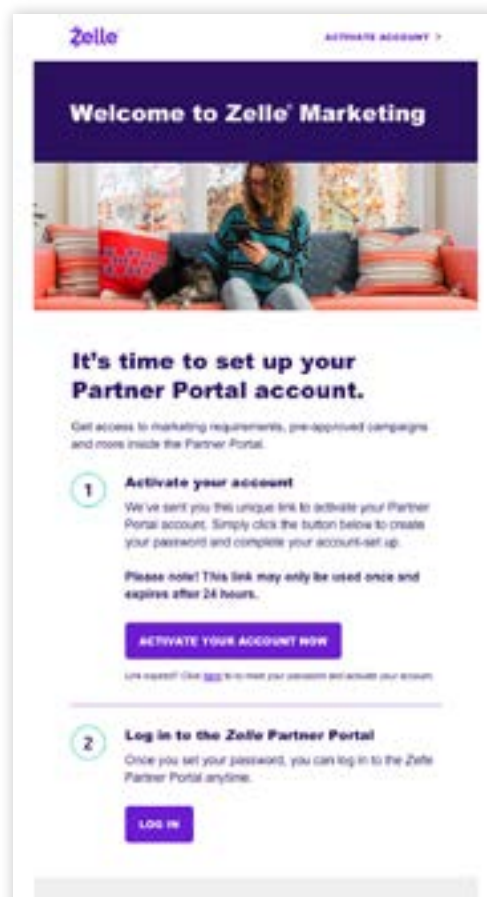
And don't forget the *Zelle* Partner Toolkit includes pre-approved subject lines.



# Onboarding Email Templates

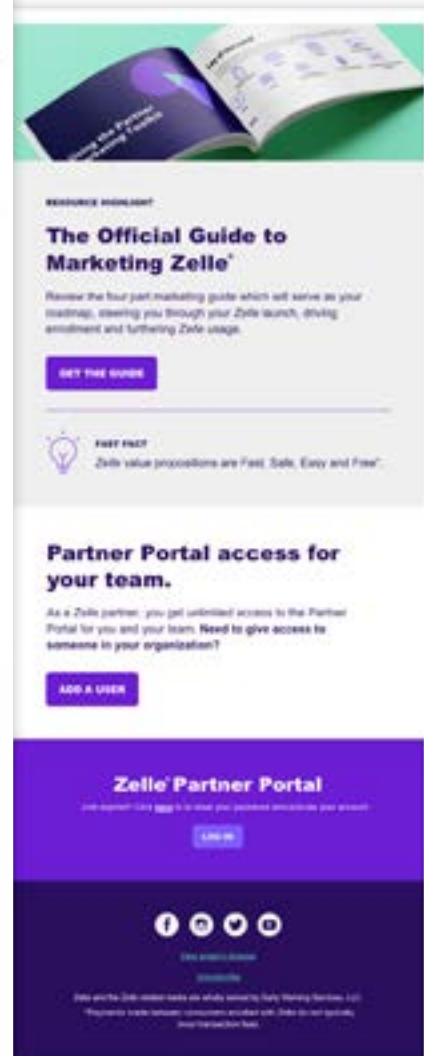
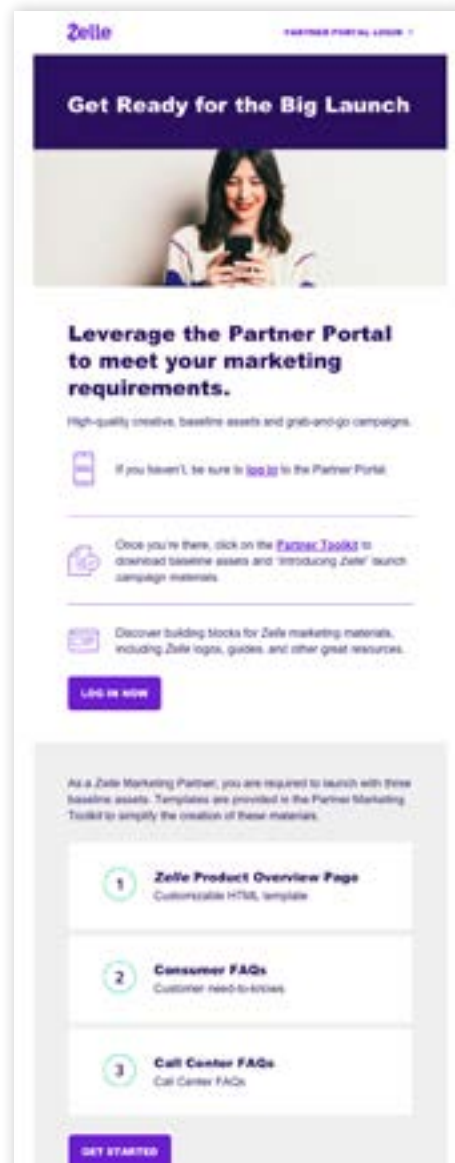
EMAIL 1

# Welcome to Zelle® Marketing



EMAIL 2

# Get Ready for the Big Launch



# Future Content Needs

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## ARTICLES OR LANDING PAGES

The Top FAQs (with additional interlinking in Portal)

New "Complete Guide" landing page

Pre-launch Assets landing page (or links to various pre-launch asset pages)

Fiserv-specific messaging, landing page, and content

*Zelle* Alongside Other Financial Product Campaigns (checking, HELOC, small business transfers, etc.)

Introducing your agency partner to *Zelle* (multiple resources)

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## VIDEO

Updated "Get To Know *Zelle* Brand" Video

Updated "Portal Demo" Video

"How to Create Custom Assets" explainer

"Introducing the Partner Toolkit" explainer

*Zelle* personas and payment scenarios educational videos

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## OTHER

Profile Builder (titles, needs, future segmentation)

Shareable actions for specific content

*Zelle* "Partner Mailer" to institutions that do not have a contact in-Portal or engaged in the last year

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## TECHNICAL NEEDS

MarComm - SF/Pardot Connection (carry leads through to accounts)

Fiserv Segment for future content track

Future Portal/Pardot connections

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## SURVEY METHODS

"Where are you?" Timeline Survey

"What's working" *Zelle* Asset Performance Survey

"Resource rater" *Zelle* Resource ratings allow you to sunset low/no-use assets

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## PORTAL IMPROVEMENTS

Migrate away from PDFs and downloadable education to embedded and linked education.

Ensure all naming, file categorization aligns with your direction in the "How to Market *Zelle* Guide" and onboarding program (e.g. Awareness/Education/Enrollment vs. Introducing/First Use terminology)

zelle®