

Project Overview: Silicon Valley Bank (SVB) UX Content Strategy

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Description

My role: UX content strategist and copywriter

Responsible for:

-Creating and executing a digital adoption strategy for SVB's client enablement (help) content within its ACH Origination platform

-Collaborating across multiple internal teams (product, client services & training, and communications) to ensure that the help content created clear content and workflows that enable clients to answer questions and complete tasks within the digital banking platform.

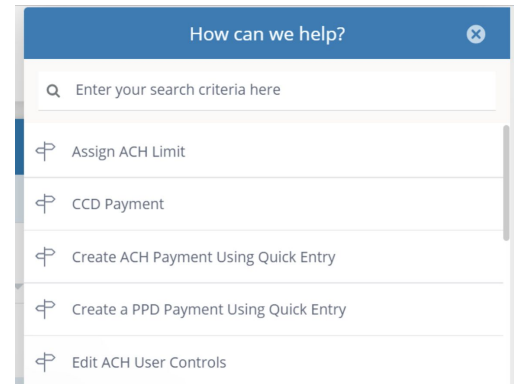
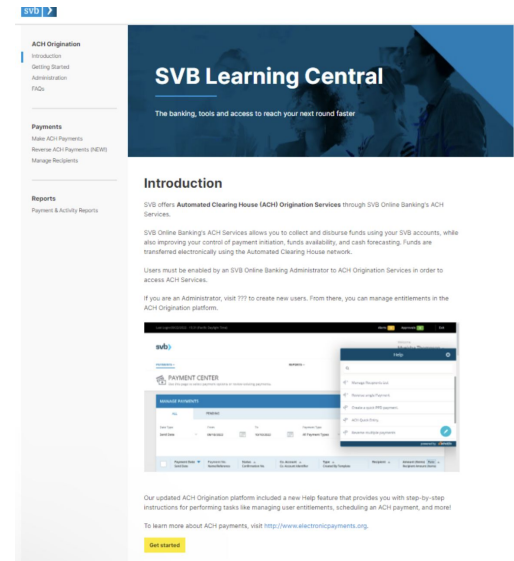
The project: Digital Adoption in User Experience

-A critical part of SVB's digital adoption plan for its online platforms and applications included moving from static website client help content to real-time, contextual, in-platform user content.

-I was responsible for creating and executing a strategy for creating help content workflows and content design features within the ACH Origination platform.

-I was also responsible for writing the copy for all workflows, pop-ups, carousels, interstitials, smart tips, and beacons.

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Content Strategist | Copy and Content Writer | Marketing Manager



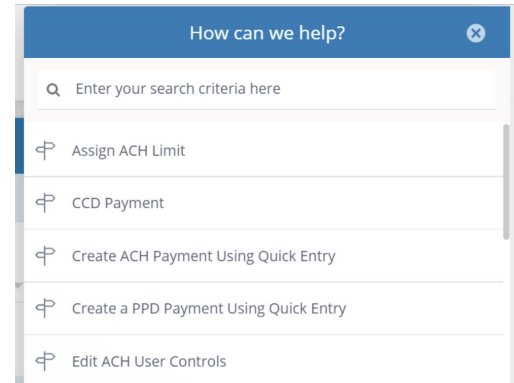
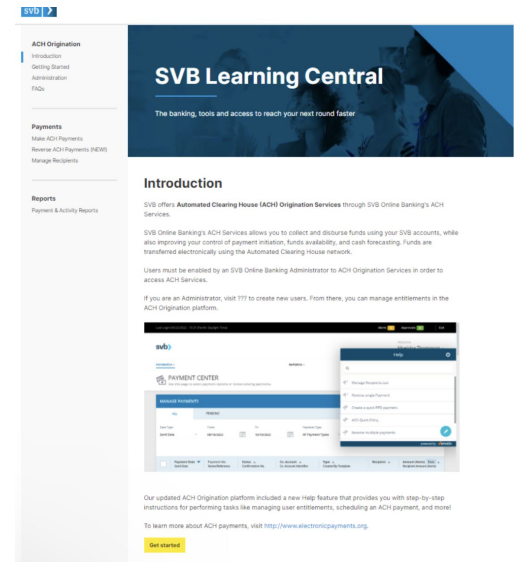
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Challenges and Constraints

-The ACH Origination platform was a third-party solution with little to no options for UI customizations to ensure visual and functional continuity with the main SVB online banking platform.

-In addition to moving the client help experience from static content to in-platform contextual, and dynamic content, SVB had to consider another hurdle: the experience of current clients who would be changing both the ACH Origination platform experience as well as the way they access help.

-Internal teams like client support & training needed additional resources to replace their current process for answering help inquiries for existing and new ACH Origination clients.



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High-Level Approach & Outcome

1 Create User Stories

- Document use cases for the ACH origination platform
- Write user stories that detail discrete acceptance criteria for individual content items or workflows; this includes considering context for existing vs new client

2 Conduct Content Audit

- Comprehensive review of current client help content to find existing content that may be usable
- Use data from main platform and client call center to get an idea of the most common help topics
- Prioritize content development based on the feature release schedule from product teams

3 Design, Create, & Test Content

- Create content design strategy based on user stories (employing various UX content types like popups, carousels, interstitials, and smart tips)
- Write copy for all content types using guidance from the SVB digital platform style guide
- Test functionality and usability of all content types within the ACH Origination platform test environment
- Validate functionality within platform production environment (and troubleshoot as needed)

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