Client Enablement Content Development Kick-Off Meeting for Fraud Control Services

July 7, 2022

Agenda

1. Review assumptions for the FCS product launch and migration efforts
2. Show examples of current Learning Central and WhatFix content and what's available for FCS content
3. Begin gathering client user story info (How do I…?)
4. High-level production timeline and next steps
5. Q & A

FCS/Positive Pay Initiative Product Launch Assumptions

product pilot launch is planned for the September 20, 2022; client upgrade/migration is planned for TBD

- SVB will launch ACH Positive Pay (**new product**) and Check Positive Pay (upgrade current check product)
  - FCS currently provides clients the ability to monitor check transactions and to return fraudulent items via automated rules and manual review and decisioning (Check Positive Pay).
  - **NEW FEATURE**: SVB will offer Reverse Check Positive Pay
- Both products (ACH and Check) will be a white label of the new vendor's (Alkami) system.
- SVB clients will be able to access the FCS products through an SSO process from both eConnect and SVBGo.
  - Per Tony on 6/30: **1st wave will be both eConnect and SVBGo clients, but most will be eConnect users**. This is because most of the Fraud Control Services clients are more mature and complex, and most of those clients are still on eConnect.
  - In both cases, the client will SSO to the vendor product.

Client Enablement User Experience Content Development Approach:

creating content through a client-focused lens

The focus of the client enablement content will be to provide the best user experience possible by:

- anticipating their questions and needs within the new product.
- ensuring that users find the content they need and complete specific actions quickly and easily.

svb

Discovery & Planning

1. Work product owner(s) and other internal team members, as needed, to document user stories that detail how users at all levels will most likely interact with the product (roles, permissions, key functionality) ← WE ARE HERE
2. List content topics needed based on what we uncovered in the user stories (i.e., what actions users will need assistance with)
3. Validate and finalize list of topics; decide where the content will live (Learning Central, WhatFix, or both)
4. Audit current Learning Central content to determine what can be used/edited to build content components for each user story, as well as what content is best for the WhatFix solution.

Implementation

1. Draft Learning Central and/or WhatFix content component for each individual user story
2. Go through review and editing process with stakeholders
3. Finalize content components for both Learning Central and WhatFix
4. Upload/build out content on Learning Central and in WhatFix

Content Types and Examples

Client Enablement content is designed to answer client questions and/or empower them to complete a discrete action with clarity and ease, while avoiding the need for them to contact CAS or other SVB resources.

- **How do I…?**
- **What can I…?**
- **What do I do if…?**
- **What happens if…?**

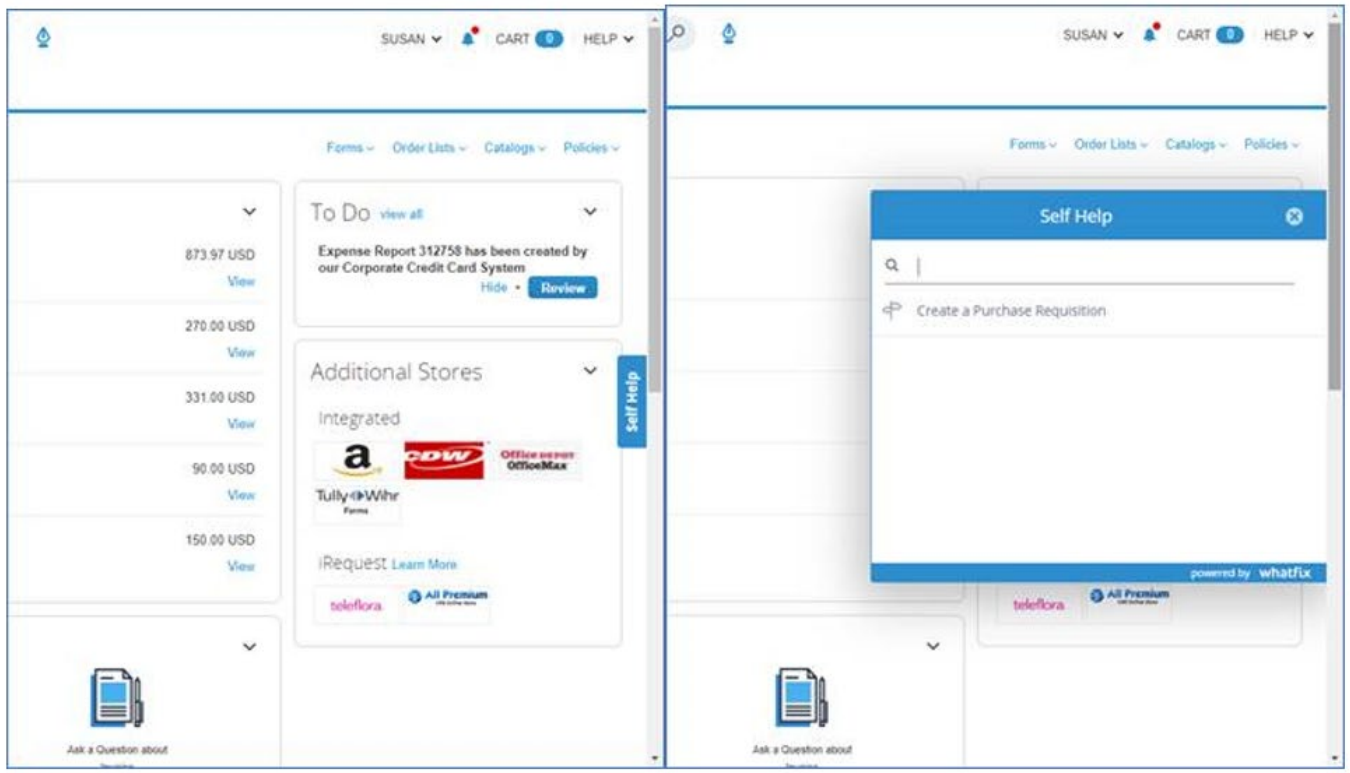
Learning Central Content

- Lives on the SVB.com domain (eConnect and SVBGo)
- Static content (not interactive)
- Uses screenshots and steps to communicate discrete instruction. We list steps in eConnect's Learning Central, but we want to stay away from that in SVB Go's Learning Central (use WhatFix more)
- Can be referenced from inside of the WhatFix instance that lives on the vendor platform

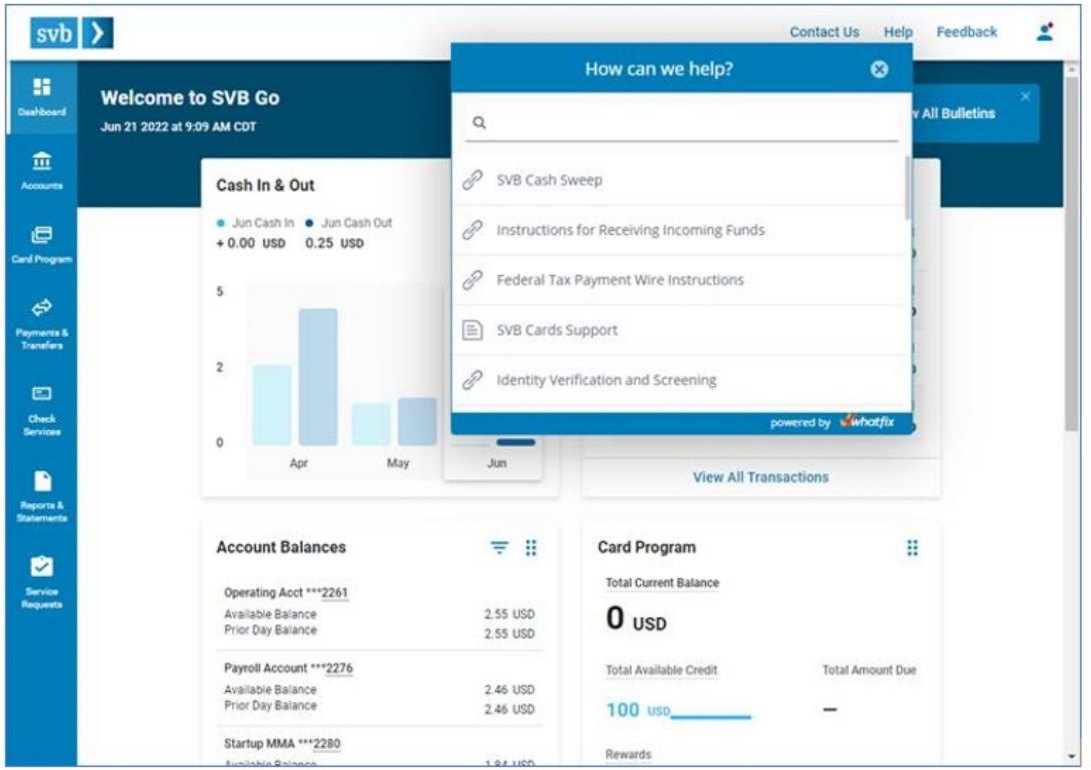
WhatFix Content

- Accessed through the vendor platform (using scripts provided by WhatFix)
- Both static and interactive/step-through content options (What is…? vs How can I…?)
- References Learning Central content when appropriate. On the SVBGo platform, we're taking a "WhatFix first" approach to creating content

WhatFix UI Integration Options

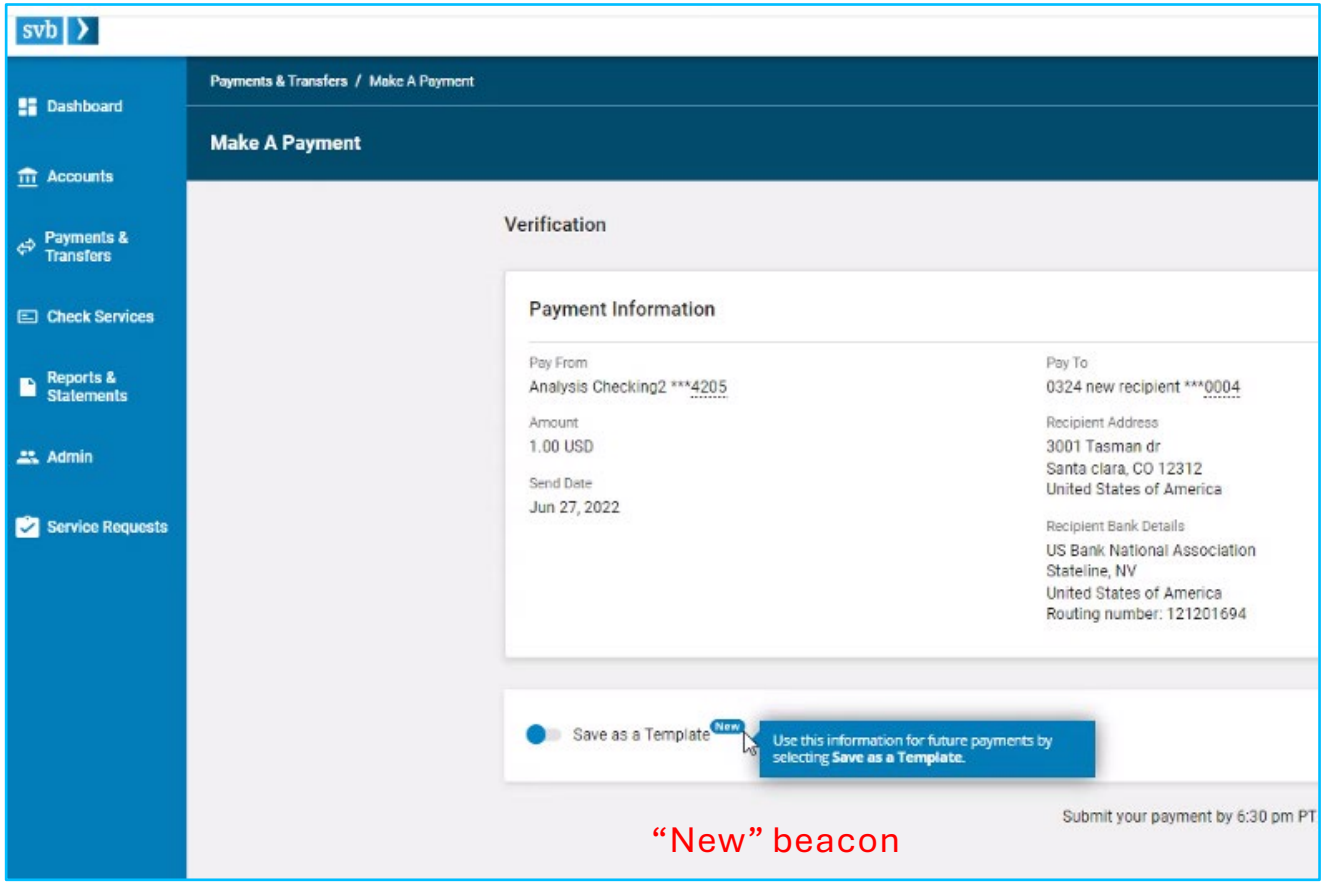


This is how the out of the box Whatfix Help widget displays. We can title it whatever we'd like (doesn't have to be "Self Help") and position it on either side of the screen.

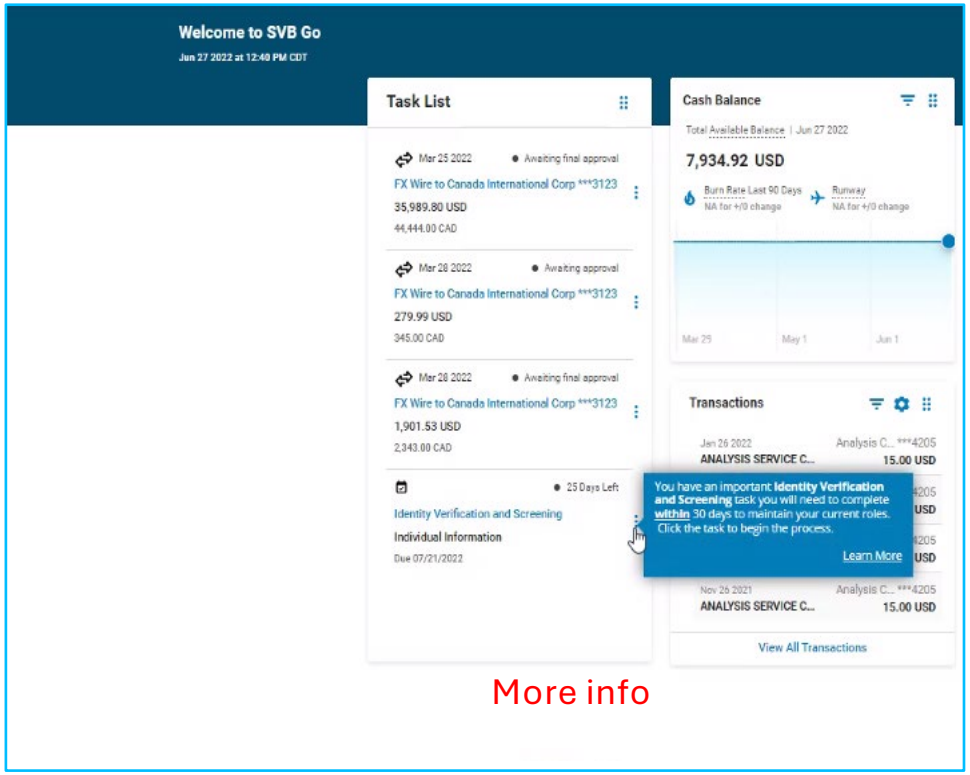


For SVB Go, we 'attached' the Help Widget to the UI element for 'Help' in the code. If this is a desired state based on the UX of the new Alkami platform, we can have the Whatfix DAA (our internal resource) review with the vendor.

WhatFix Content Examples



"New" beacon



More info

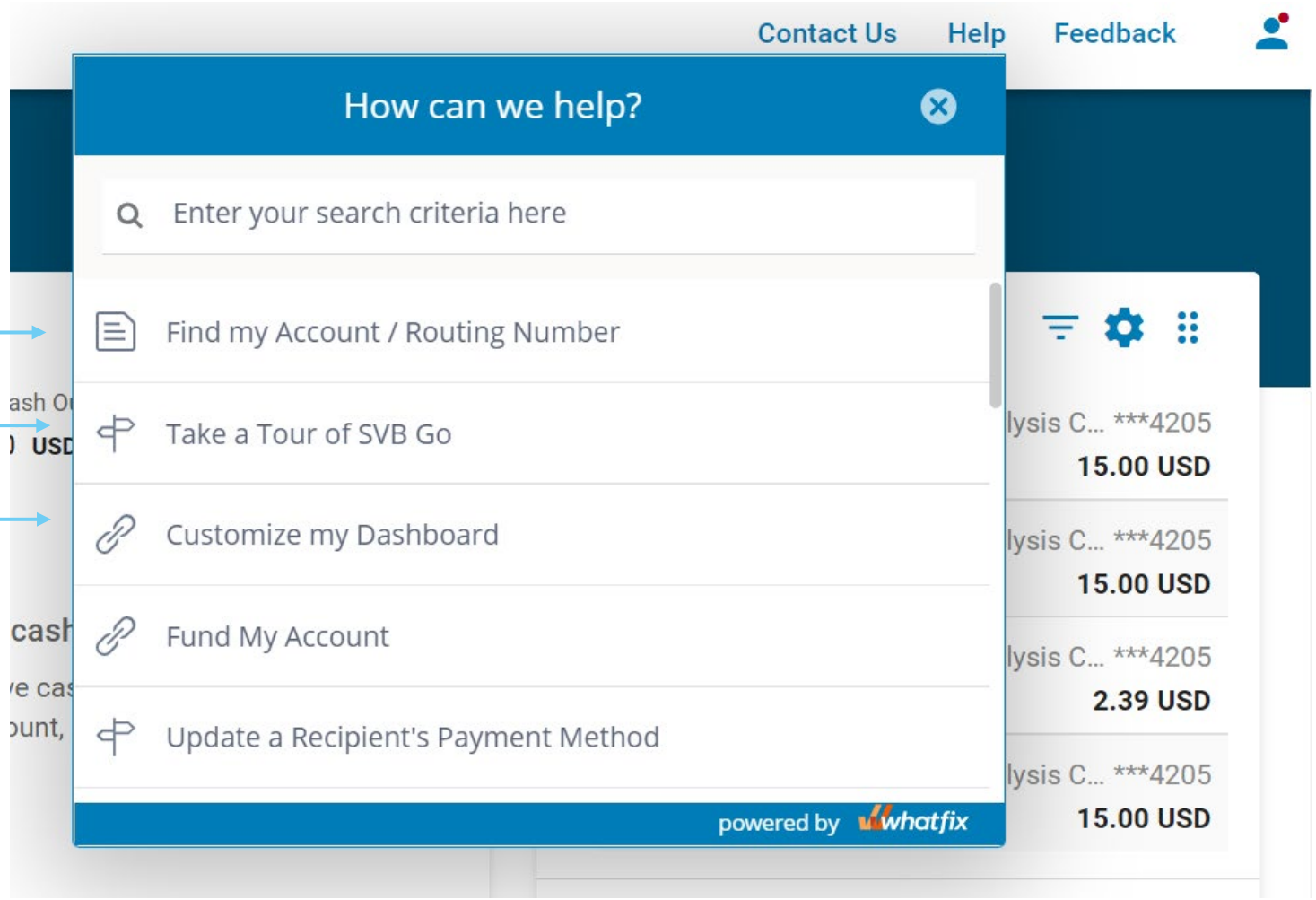
More info

WhatFix Content Examples

Embedded content

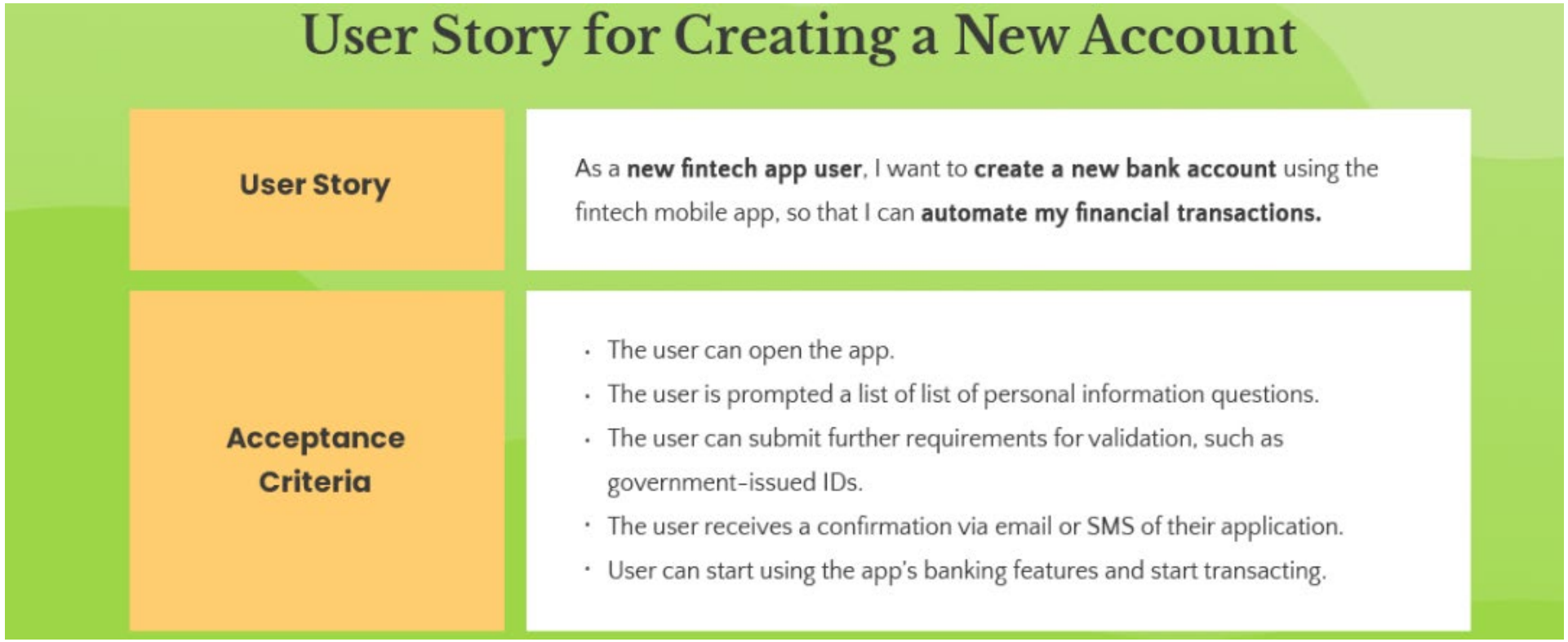
Step-through content

Links out content



Example User Stories

- We will create user stories as the basis for all individual help/content components. (FCS doc)
- Each content component should lead the user to complete the function noted in the “so that” portion of the user story.



Positive Pay Deliverables & High-Level Timelines (product launch only)

Deliverable	Week of	Assumptions	Dependencies & Risks
Draft user stories to product owner/stakeholders for review	July 4, 2022	• Stakeholders will be available for working sessions to validate user stories and provide feedback	
Final user stories	July 11, 2022	• Stakeholders will be available for working sessions to validate user stories and provide feedback	
1st draft of content for Learning Central and WhatFix	July 25, 2022	• UI for product will be at completed or at the end stages of development • 6/27 availability - WhatFix code implemented in lower and production environments for WhatFix to display in SVB instances (test and client IDs) • Testing for WhatFix features and content display **completed between 6/27 and 7/15 (Tyra and her resource)** • TBD – Additional WhatFix configurations based on testing outcomes • Test IDs (based on client roles) for WhatFix content development and testing	• If the UI isn't complete, then we will not be able to complete production for WhatFix or Learning Central content • 6/27 availability - WhatFix code implemented in lower and production environments for WhatFix to display in SVB instances (test and client IDs) • Testing for WhatFix features and content display • TBD – Additional WhatFix configurations based on and testing outcomes • Test IDs (based on client roles) for WhatFix content development and testing
2nd draft of content for Learning Central and WhatFix	August 8, 2022		
Final, approved content for Learning Central and WhatFix	August 22, 2022	• UI for product will be complete so that we're able to capture correct screenshots • Production regression testing protocol (TBD if vendor involvement required) product environment	
Upload/Build-out of content for Learning Central and WhatFix	September 5, 2022	• We have a WhatFix DAA resource (shared TAG resource) to implement WhatFix content • LC and WhatFix content to be ready just prior to the target go-live date of 9/12 (not before).	If the internal resource isn't available, then we may need more time tom implement the WhatFix content and perform testing. If the LC and Whatfix content needs to be ready before 9/12 (e.g. to include in client migration comms), then timelines must shift and may be at risk.

Q&A