

# Writing Samples

*Giovanni Ella*

# First things first

In order for content to help drive a delightful user experience, the content strategist should be involved in the early product and design discussions. This helps ensure that content can influence the design strategy.

It's imperative that one take a user-centered design approach when building a user experience, which means:

- Understanding the business needs
- Listening and applying what customers have to say
- Synthesizing and analyzing both business and customer needs
- Suggesting improvements
- Testing, executing, measuring and iterating

# A UX Content Strategy could include...

- Voice and tone
- Specific copy dos and don'ts
- Things identified from the experience that need to be changed and why
- The purpose of the feature/service and how that drives the content strategy (e.g., utility vs. selling)
- Best practices from research, testing, the industry, competitors – these can be built in as justification for recommendations
- Specific calls to action
- Future considerations (e.g., content maintenance, etc.)

# Editorial Guidelines

In addition to following company brand standards and guidelines, **voice considerations** could include:

- Having a human-friendly, natural conversation
- Using “you” instead of “the customer”
- Focusing on the customer benefits
- Soliciting immediate action
- Focusing on clarity and brevity

**Tone considerations** could include being direct, reassuring, informal, etc. Phrases that can be avoided could include:

- “We guarantee”
- “We cannot/never” (don’t present roadblocks or delays)
- “Your account is eligible or ineligible” (don’t present customers with any misleading information about their accounts)

# Writing Samples

In the following pages, you'll find a mix of content work including **product UX**, an **email notification** and an **onboarding email series**.

# #1: First Mobile App

*Develop the company's first native mobile app (iOS)*

## **Background**

Consumers have become accustomed to user experiences that have fast access to information and real-time tools geared to help them make smarter financial decisions. Mobile access is about being up to date and anticipating a customer's needs based on their context.

## **Solution**

To help increase the value of Financial Engines' paid service, Professional Management, we developed the first ever native mobile app experience for customers. We focused on helping our customers build retirement plans using an approach that's personal, proactive and comprehensive.

# Financial Engines: Personalized, Unbiased Investment Advice [View More by This Developer](#)

By Financial Engines

Open iTunes to buy and download apps.



[View in iTunes](#)

Free

Category: [Finance](#)

Released: Aug 18, 2016

Version: 0.5.0

Size: 6.7 MB

Language: English

Seller: Financial Engines Inc

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Rated 4+

Compatibility: Requires iOS 8.1 or later. Compatible with iPhone, iPad, and iPod touch.

### Customer Ratings

We have not received enough ratings to display an average for the current version of this application.

### Description

Financial Engines uses innovative technology to deliver high-quality, unbiased investment advice to millions of people—regardless of their wealth or investment expertise. Within seconds and a few taps, you'll have direct, anytime access to your Professional Management account.

With the Financial Engines iPhone app, you can safely and securely:

- \* See how you're doing and tracking towards your retirement goal
- \* View your portfolio and estimated Retirement Paycheck balances
- \* Schedule a call with an advisor
- \* See when we reviewed your portfolio and rebalanced your account
- \* Access monthly market summaries, tips and insights to help you retire well

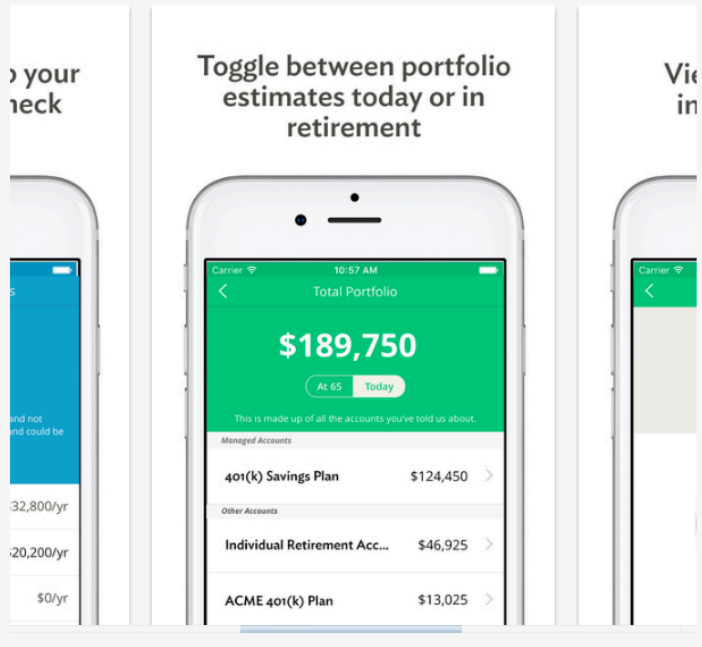
How Financial Engines can help

We get to know you and build a personalized investment portfolio using the funds available in your 401(k). We assess each fund by looking at its performance history, cost and what the fund invests in—and then choose funds that are appropriate to meet your goals. This is based on your age, how long you want to work, risk preference and overall financial picture.

Apple & iPhone are registered trademarks of Apple Inc.

[Financial Engines Web Site](#) | [Financial Engines: Personalized, Unbiased Investment Advice Support](#)

### iPhone Screenshots





**financial** engines®



### How we can help

We analyze what matters—risk, expenses, style, turnover—then tailor a fund allocation designed around you.



**Got it**





financial engines®



### Education Center

Access monthly market summaries, tips and insights to help you retire well.



Got it



financial engines®



**Schedule a callback**

Busy now? We'll call you back  
when it's a better time.



Next



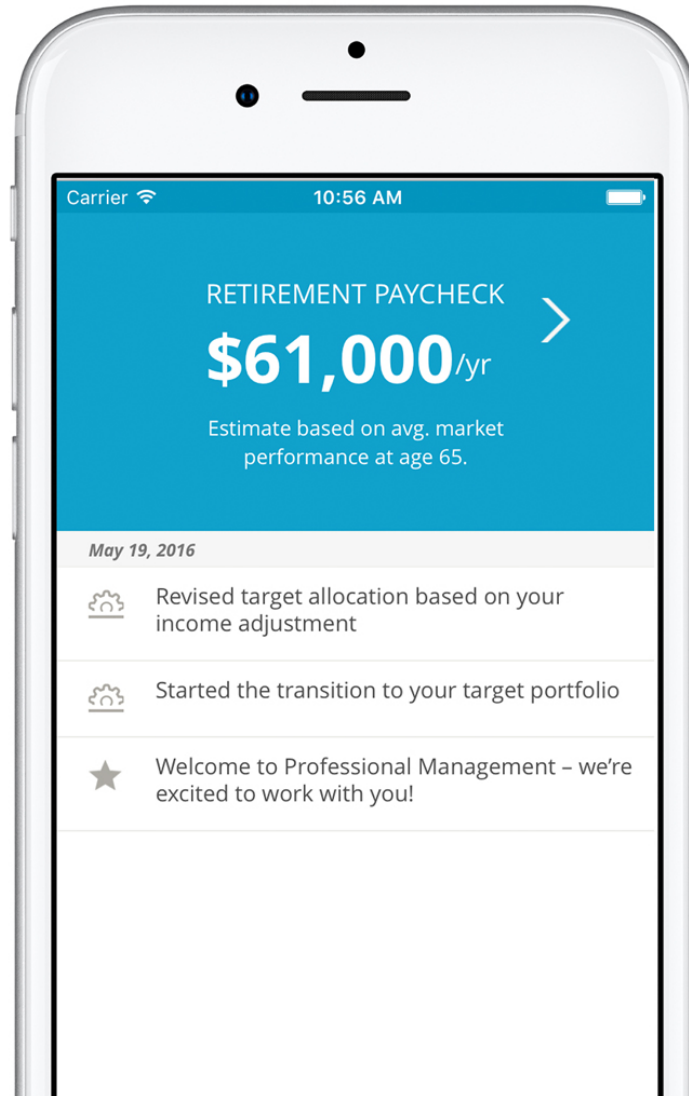
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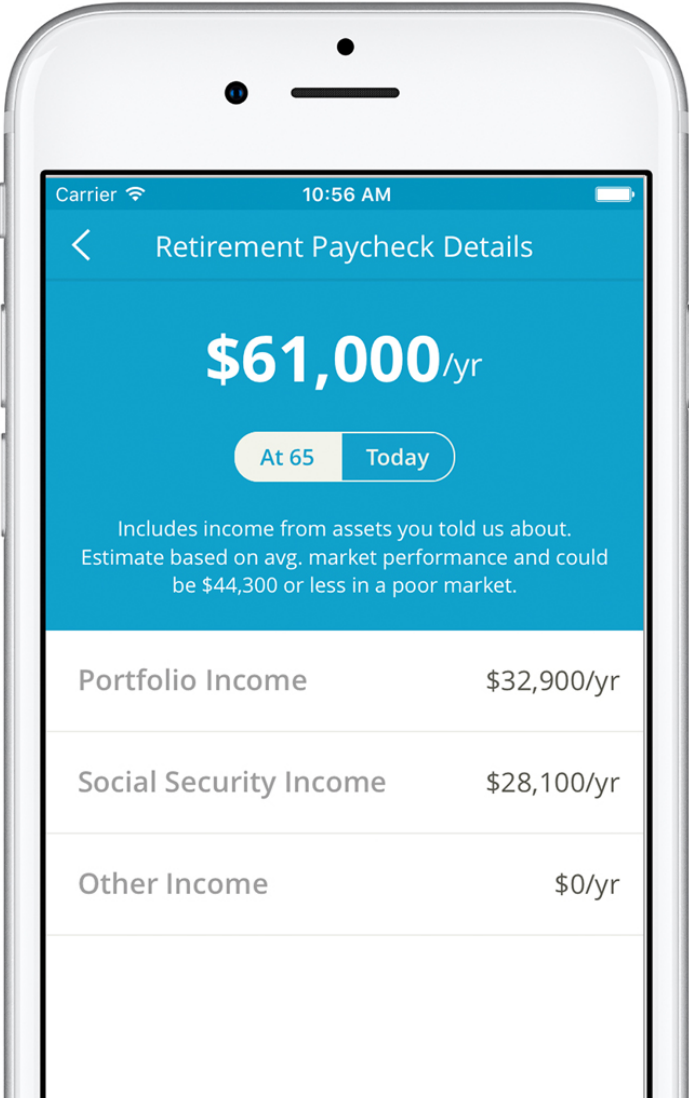
Sorry, we're having trouble finding your account. Please call an advisor for help.

[Call Advisor Now](#)

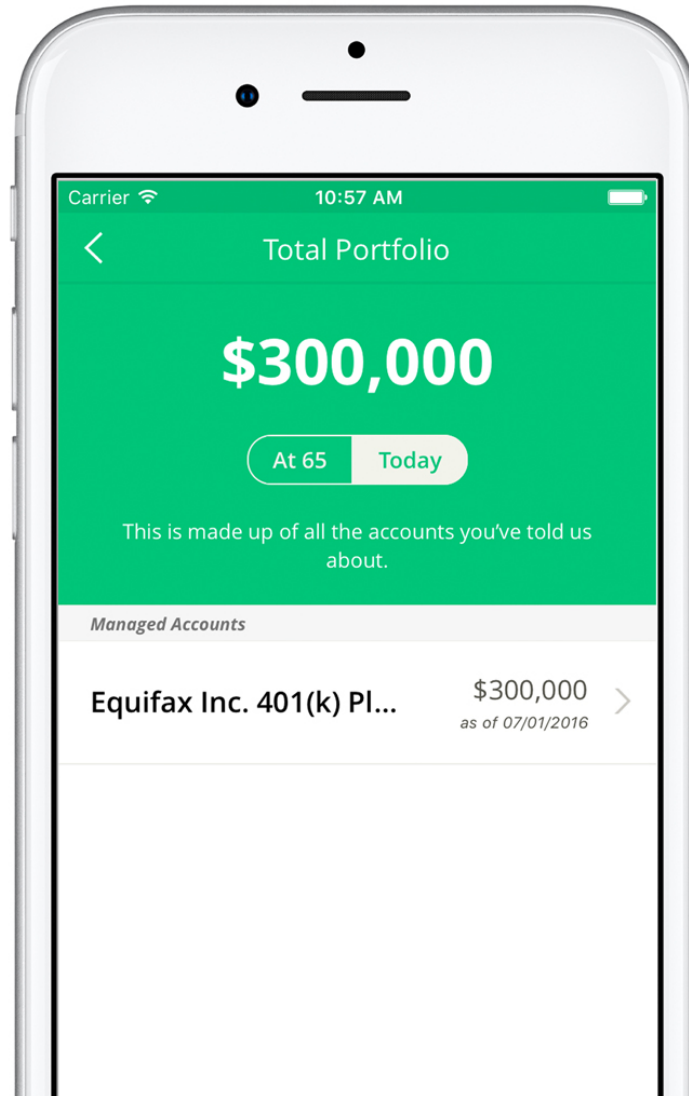
# See all of your account activity at a glance



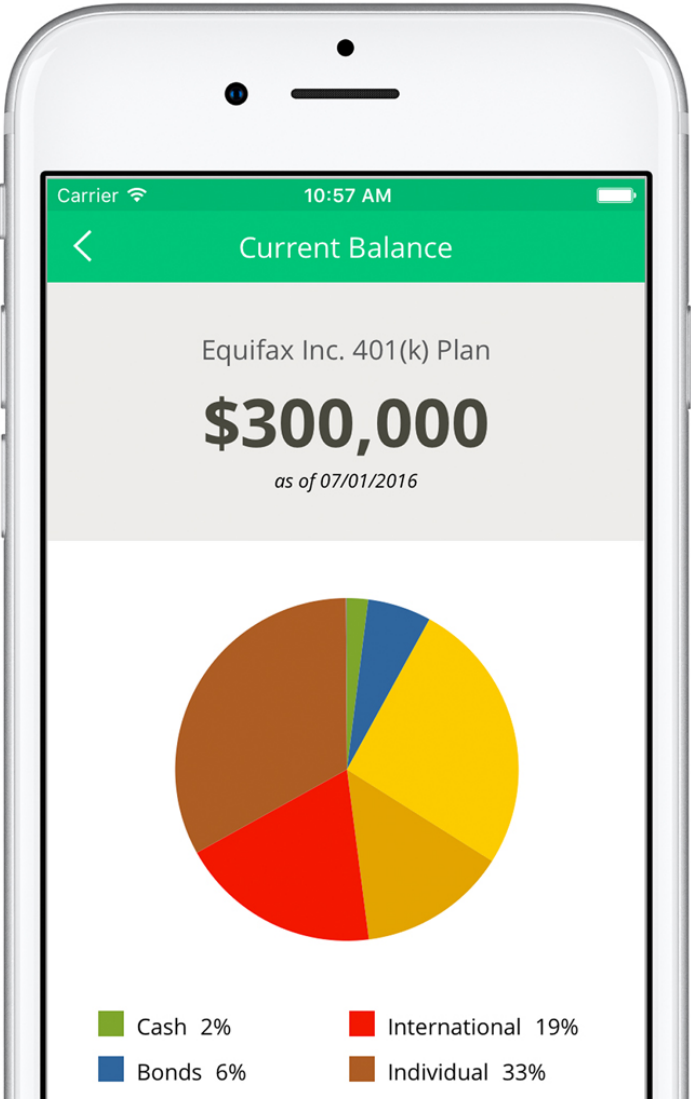
# See what makes up your Retirement Paycheck



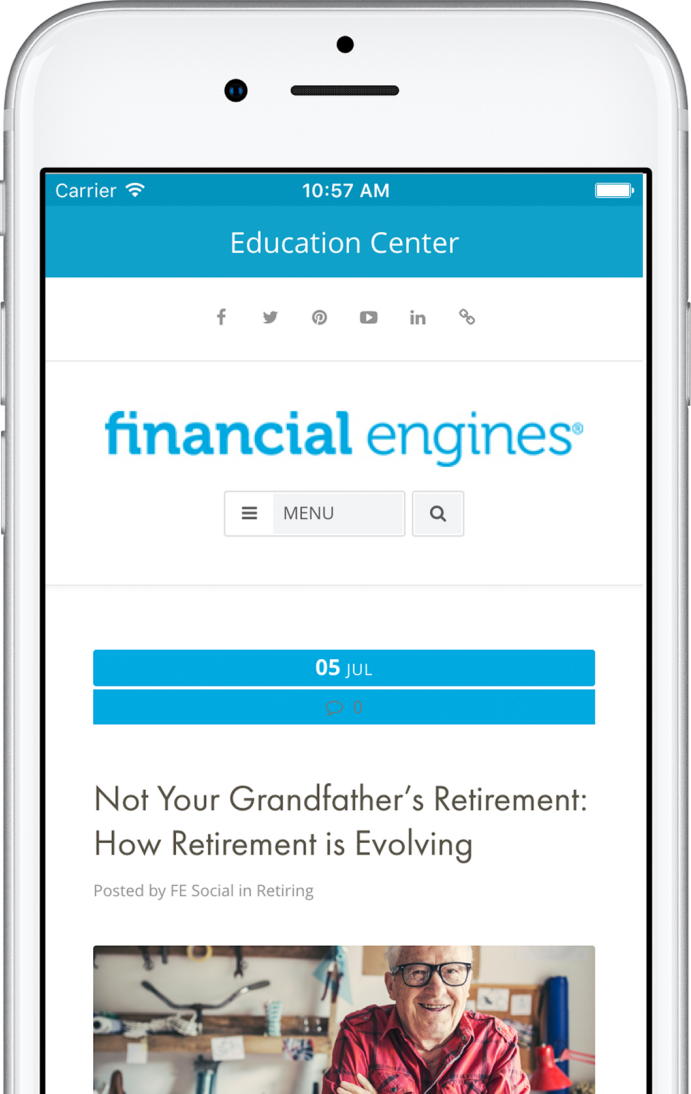
# Toggle between portfolio estimates today or in retirement



# View your fund allocations across different asset types



Keep helpful information,  
tips and insights at your  
fingertips





# #2: Card-Free ATM Access

*Create a mobile intercept screen quickly to address a gap in the experience*

## **Background**

Card-Free ATM Access enables retail customers to authenticate via their mobile phone device so they can access an ATM without having to use their physical ATM or debit card.

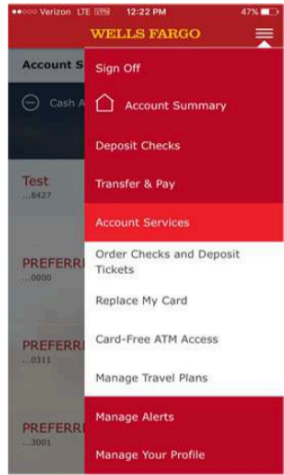
## **Solution**

Add an intercept screen to address customers who haven't registered their device for Advanced Access, which is required in order to use the Card-Free ATM Access service.

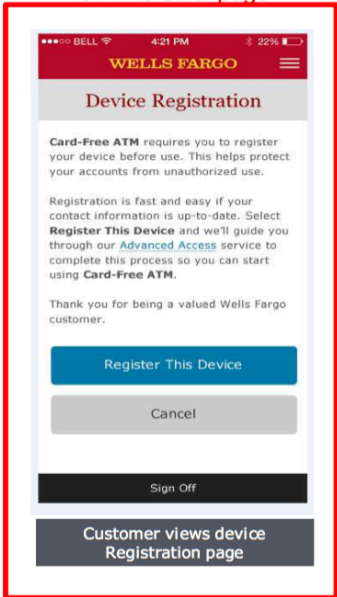
## **What's worth mentioning**

The copy for this screen was written and approved by all stakeholders in 1 week, which is virtually unheard of at Wells Fargo. The velocity was largely due to the importance of patching the gap in the experience that was discovered after code freeze.

# Card-Free ATM – Advanced Access Alternate Flow

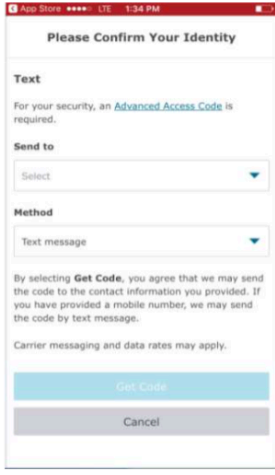


Customer Taps on Entry Point

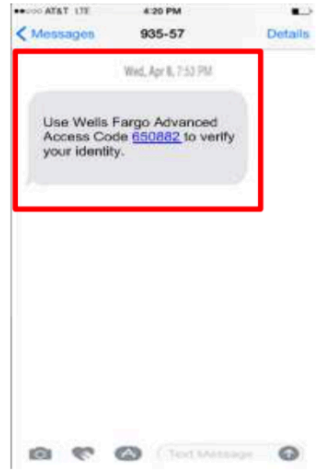


New interstitial page

Customer views device Registration page

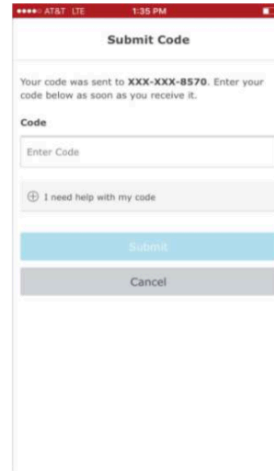


Customer gets presented with AA Screen




Updated language SMS text

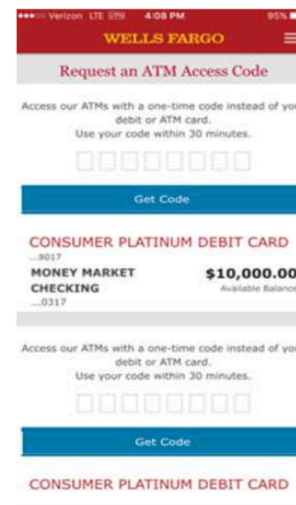
Customer receives code via SMS



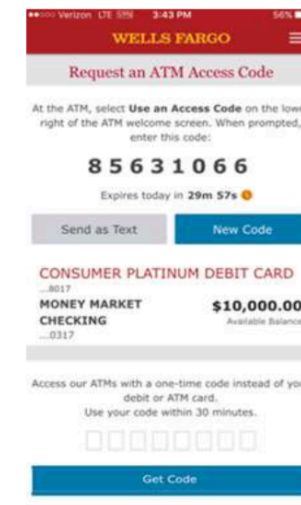
Customer enters the code



Customer lands on "How it Works Page"



Customer requests code



Customer receives code in app



## Register Your Device

You're almost ready to start using  
Card-Free ATM access!

First, you'll need to register your device.  
It'll take just a minute through our  
Advanced Access service, where we'll  
ask you to confirm or verify your  
identity.

Register Device

Not Now

Sign Off

# #3: Control Tower

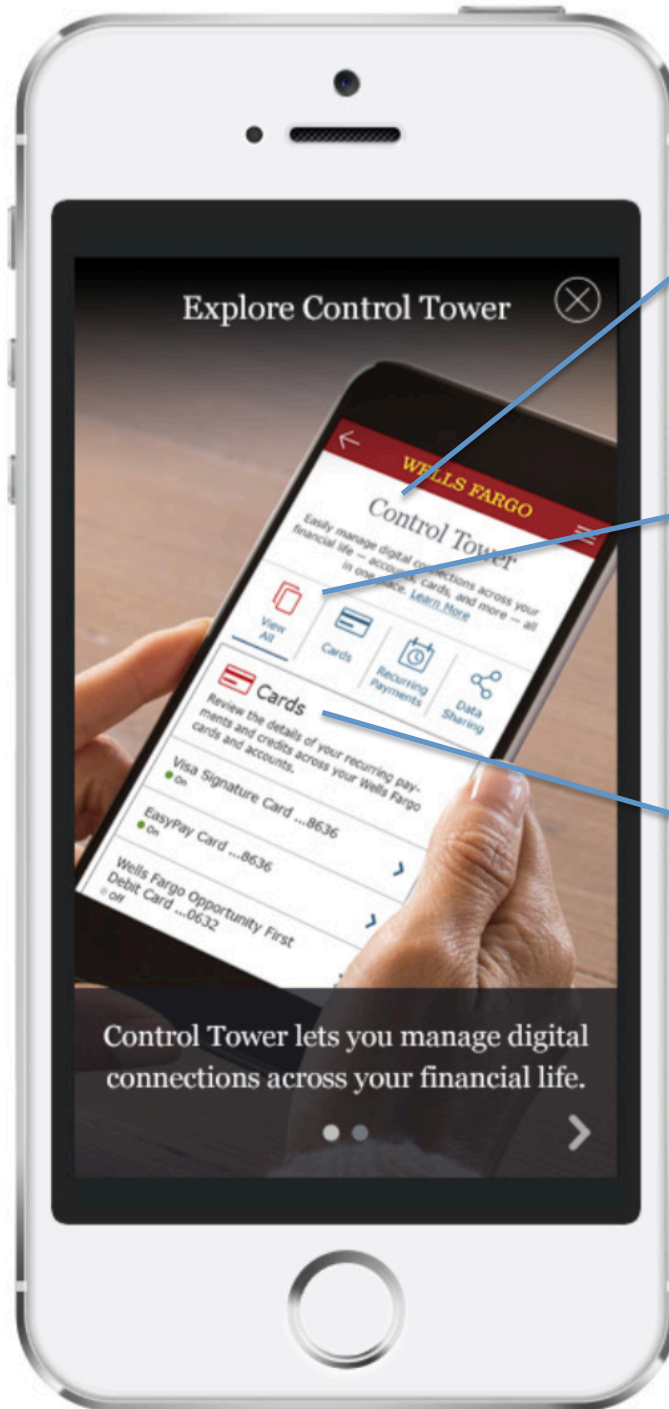
*Build a new product that lets customers easily track and control their digital financial lives*

## **Background**

Control Tower helps customers manage their digital financial footprint quickly and easily by giving them access to the connections between accounts, merchants, apps, devices and digital wallets. Considered a “game-changer” at Wells Fargo, Control Tower has seen plenty of visibility, including from Wells Fargo’s Chief Executive Officer and President, Tim Sloan.

## **Solution**

Create a home screen with content that succinctly articulates Control Tower’s benefits and features.



## Control Tower

Easily manage digital connections across your financial life – accounts, cards, and more – all in one place. [Learn More](#)

## Filter ribbon:

- View All
- Cards
- Recurring Payments
- Data Sharing

## Cards

Review the details of your recurring payments and credits across your Wells Fargo cards and accounts.

# #4: Fraud Email, SMS & Push Content

*Contribute to evolving global content standards*

## **Background**

When we detect a possible unauthorized sign-on attempt to a customer's account, we immediately trigger communications to let customers know what happened.

## **Solution**

Create communications that lets customers know about a possible unauthorized sign-on attempt to their account, and provide a clear and easy solution to get them back on track.

## **What's worth mentioning**

Prior to this communication, the standard at Wells Fargo was to use links in emails. My work with the product team introduced the need to disable links, which contributed to evolving Wells Fargo's global content standards.



|

{HTML EMAIL HEADER}

From: Wells Fargo Online << SUPL: Standardized Notification FROM Email Address >>  
Subject: Your Wells Fargo Online access has been disabled

{HTML EMAIL CONTENT}

{Header 1}

**Create a new password to restore access to your accounts**

**What is happening**

We recently detected a possible unauthorized attempt to sign on to your account. To help protect your accounts, we disabled access to *Wells Fargo Online*®.

**What this means to you**

Until you create your new password, you'll be unable to sign on to *Wells Fargo Online* to access your accounts.

**What you need to do**

Create your new password now. Here's how:

1. Go to wells Fargo.com.
2. Click **Forgot Password/Username?** below the sign-on box.
3. Click **My password has been disabled** and follow the instructions to create your password.

For added security, we also recommend that you change your username by signing on to *Wells Fargo Online*, and going to **Update sign-on settings** under **Security Center** in the dropdown menu.

**We're here to help**

If you need help creating your new password, changing your username, or have other questions, please give us a call at [VAR: Customer Service].

Thank you for choosing Wells Fargo.

Wells Fargo Online Customer Service

{Disclosure Text}

**Please do not reply to this automated email.** To send a secure email, sign on at wells Fargo.com/questions.

=====

{SMS CONTENT}

Your Wells Fargo online access is disabled. Create a new password to restore access. Questions? [VAR: Customer Service]

=====

{PUSH CONTENT}

Online access disabled. Change password at wells Fargo.com or [VAR: Customer Service]

=====

# #5: Welcome Email Series

*Articulate the value of a service through personalization and transparency*

## **Background**

Customers who have complex needs (closer to retirement, have higher 401(k) balances and outside assets) cancel at higher rates because they don't see the value of Professional Management. Providing more transparency into the way we manage their money, and focusing on how to reach their retirement goals will help to increase the value of the service.

## **Solution**

Give customers more confidence that they made the right choice in choosing Financial Engines to manage their retirement plan, and show how we'll help customers achieve their retirement goals.

## **What's worth mentioning**

In the first 3 months after its launch, this email series helped to decrease the Professional Management cancellation rate by over 14%.



Have a question about your plan account? [Call us.](#)

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Let's Build Your Portfolio



David Ankrom  
VP, Investor Services

Hi [Username],

**Welcome to Professional Management.**

This is the beginning of a great relationship that will make planning for your retirement simpler, smarter, and completely tailored to you. To start, we'd like to briefly talk to understand your goals and create a plan that suits you—the more we know, the better we can plan.

Thank you,

**David Ankrom**

Vice President, Investor Services

Let's get to know you by reviewing your goals.

[Schedule a Call](#)

What you'll get with Professional Management:



**A Familiar Voice**

We speak in human terms—not finance jargon—which makes it easy to learn, ask questions, or simply have a conversation with an advisor representative.



**Proven Methodology**

With over 9 million people in our network and 19+ years of experience, you can rest assured our methodology has stood the test of time.



**Peace of Mind**

We take the work and worry out of your retirement. And to do so, we help you control for risk and avoid unnecessary fees.

Questions? We're here to help.

(855) 225-1379

M-F, 9AM-9PM, ET

[Read more about Financial Engines](#)



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Learn more from an Advisor Representative. [Call Us.](#)

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Let's Get Personal



Hi [Username],

Helping you make the most out of your retirement assets starts with knowing your goals and examining your entire portfolio—from your [sponsor name] 401k plan and beyond. Call an advisor representative today so we can talk about your goals and share how we could help.

Take a few minutes to learn how we track your goals.

[Schedule a Call](#)

Things you can do today:



**See the Bigger Picture**

Add your other accounts to get a more holistic view of your financial future and more help keeping you on the track towards retirement.



**Make a Statement**

Opt to go paperless and receive a digital copy of your quarterly statement by changing your [communication preferences](#). It's fast, easy, and green.



**Check in Whenever, Wherever**

Want to see how your account is doing? Simply log in to your 401(k) provider account site, and navigate to Financial Engines to check in.

Questions? We're here to help.  
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Learn more about Financial Engines from an advisor representative. [Call Us](#).

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We're Working on  
Your Plan



Hi [Username],

**Good news!**

Your initial personalized Retirement Plan has been created and should be arriving in the mail in two weeks. This plan is our recommendation based on your goals and it'll include:

- *Side-by-side comparisons of your current investments and our proposed plan*
- *A breakdown of your current investments and retirement outlook*
- *Considerations for improving your current savings contributions*

And of course, you can always update your goals online or with an advisor representative.

More about what your plan will include:



**Your Retirement Outlook**

This is our way of estimating what you could have at retirement every year—making it easier to see the lifestyle you can look forward to.



**A Balanced Plan**

In helping to manage your portfolio, we make sure to balance safety in a way that's typical for your age and risk tolerance.



**Asset Diversification**

To help create a plan that can weather the markets over the long term, we'll create a diversified plan and compare them to your current plan for your review.

Questions? We're here to help.  
**(855) 225-1379**

M-F, 9AM-9PM, ET

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Have questions about your plan? [Call us](#)

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Ready, Set, Goal



Ian  
Advisor Representative

Hi [Username],

By now you should have received your Retirement Plan in the mail. In the next week, we'll begin transitioning your investments to reflect your new plan. Have questions about your new Retirement Plan? [Call](#) an advisor representative [hyperlink this text to a click to call] today, or [schedule a call](#) for a time that works for you.

#### About transitioning your plan:



##### Perfect Timing

Before making any transactions, we'll wait for the perfect moment to help you maximize potential returns, while controlling risk and avoiding unnecessary fees.



##### The Long Game

Transitioning your portfolio can take several months. But rest assured, we'll get you there and will keep you informed of our progress.



##### Regular Maintenance

To help keep you on the path towards retirement, we'll monitor and regularly rebalance your account.

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Speak to one of our advisor representatives. [Call Us.](#)

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You've Got Questions.  
We've Got Answers.



Ian  
Advisor Representative

Hi [Username],

Investing comes with lots of questions—we get that. Our job is to answer yours, and we encourage you to reach out to our advisor representatives whenever you have a question. They're here to help, and they can put difficult to understand concepts into plain English—no more jargon.

There are also a few other ways you can stay informed and we've outlined them below.

[Schedule a Call](#)

#### Things you can do today:



##### See the Bigger Picture

Add your other accounts to get a more holistic view of your financial future and more help keeping you on the track towards retirement.



##### Make a Statement

Opt to go paperless and receive a digital copy of your quarterly statement by changing your [communication preferences](#). It's fast, easy, and green.



##### Check in Whenever, Wherever

Want to see how your account is doing? Simply log in to your 401(k) provider account site, and navigate to Financial Engines to check in.

Questions? We're here to help.  
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Have questions? [Call us](#)

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We're Making Moves



Joshua  
Advisor Representative

Hi [Username],

**Great news!**

We're working on your portfolio. In the first few weeks after you partnered with us, we began transitioning your portfolio. And currently, we're watching the markets and preparing for the right time to help you maximize potential returns, while controlling risk and avoiding unnecessary fees.

More about Professional Management:



**What's Next?**

Every quarter, we'll provide an update including an overview of your plan, a retirement forecast, and recommendations on how to improve.



**Make a Statement**

Opt to go paperless and receive a digital copy of your quarterly statement by changing your [communication preferences](#). It's fast, easy, and green



**Check in Whenever, Wherever**

Want to see how your account is doing? Simply log in to your 401(k) provider account site, and navigate to your Financial Engines plan to check in.

Questions? We're here to help.

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# Last, but not least...

At Financial Engines, as part of building and maintaining a content strategy practice, I created – through close partnerships with product, legal and brand – content standards that enabled Agile teams to write quickly and consistently. Because I supported multiple Agile teams, it was important to provide the teams frameworks and guidelines to help them jump-start their content efforts.

## **In the following pages you'll find:**

- A screenshot of the “Content Patterns” page taken from the Content Framework & Guidelines Wiki page I created
- Sample screenshots from the “CX Framework Patterns” document, which shows how we defined and executed content throughout various parts of the customer experience

# Content Framework & Guidelines

[Start Here](#)[Writing for Scannability](#)[Content Principles](#)[Content Patterns](#)[Style Guide](#)[Empathy vs. Sympathy](#)[Resources](#)[Content Tests](#)

## Content Patterns

A content pattern is a reusable framework used to solve common content needs.

### How can a content pattern help you?

By referencing a content pattern, you'll be able to create content for a predefined need.

<p><b>Content patterns:</b></p> <p><i>CX Framework</i></p>	<p><a href="#">CX Framework Patterns</a> - see how we define and execute content throughout various parts of the CX Framework experience, including the homepage, Action Alerts and HEXI Action Flow.</p>
<p><b>Content pattern:</b></p> <p><i>Why these funds? Tooltip</i></p>	<p>This tooltip currently exists in the Validator experience. The example below shows the "before" and "after" versions. Text in orange are annotations.</p> <p><b>Before:</b> We recommend funds that may improve your expected returns. Among the factors that may affect your returns are the risk level you have selected and the fund choices available to you. We recommend funds in such proportions that the effect of each fund on your portfolio risk is justified by the fund's expected return. <i>Per one of our content principles, "Jargon or technical terms should be expressed in the simplest terms possible."</i> <i>Will our customers construe this as a tooltip or a disclosure? Lots of jargon and technical terms that makes us feel smart and the user feel ignorant.</i></p> <p><b>After:</b> We're always looking out for your best interest. How? We look at various factors that can affect your returns – like risk, performance and fees – and make fund recommendations designed to balance risk and reward to help you reach your goals. <i>Tooltips are information based, so our approach should express jargon and technical language into more simple terms.</i></p>
<p><b>Content pattern:</b></p> <p><i>IRA incident Letter</i></p>	<p>In Q1 2014, a number of participants were impacted by an IRA onboarding incident. This means that a number of participants' personal information may have been viewed by other customers that were signing up for the service.</p> <p>If you're a Financial Engines customer, what questions and emotions could be running through your mind as you're reading the communication we sent? What will you want to hear from us? How well are your concerns being acknowledged?</p> <p>It's our job to ease our customers' concerns. <i>Per one of our content principles, "Our customers always come first."</i></p> <p><b>As a Financial Engines customer, I'm probably asking myself:</b></p> <ul style="list-style-type: none"><li>• What does this mean to me exactly? <i>Our job: How do we make sense of the incident for customers?</i></li><li>• What is Financial Engines doing about it? <i>Our job: Convey that we're on it and looking out for customers.</i></li><li>• Is there anything I need to do? <i>Our job: Offer something that the customer can do today to help their situation.</i></li></ul> <p><b>Below are the "before" and "after" IRA incident letter versions:</b></p> <p><a href="#">Before version</a></p> <p><a href="#">After version</a></p>



Action Alert – Full

Usage: QRU emails

**You're passing up extra money from Home Depot**

You may be able get \$32 more per month from your employer match.<sup>3</sup>

Find out how making the most of your match could affect your take-home pay by using our simple savings calculator.

[Try the calculator >](#)

3) For important details on how we got this, click "Try the calculator".

Headline: Specific value proposition. WIIFM?

Subtext 1: Primary relevant supporting info

Subtext 2: Secondary relevant supporting info

CTA: Outcome oriented. WIIFM?

(Since this is an Action Alert, the CTA button text will be non-transaction based. We should use language like: Learn more, Show me how, etc.)

**OKAY**

**You're passing up extra money from ACME**

You may be able to get \$32 more per month from your employer match\*.  
(Although headline is a good ice breaker, the WIIFM is really the second line)

Find out how making the most of your match could affect your take-home pay by using our simple savings calculator.

(If we've told customers that they may be able to get more from their employer match, mentioning take-home pay is irrelevant. They just want to know how they can get more)

<Try the calculator> button

\*Disclosure goes here.

**BETTER**

**Get \$32 more per month from ACME\***

Make the most from your employer match.  
(Off the gates, the headline states a very clear WIIFM)

See how different contribution rates can affect your savings in retirement.  
(Information supports WIIFM and conveys a value that the customer will get by looking at different contribution rates)

<Learn more> button

\*Disclosure goes here.

**BETTER**

**You're passing up \$32 per month from ACME\***

You could be getting more from your employer match.  
(Written differently, but headline still states a very clear WIIFM)

See how different contribution rates can help put more savings into your retirement.  
(Written differently, but information still supports WIIFM and conveys a value)

<Show me how> button

\*Disclosure goes here.

## Get real-time help

Contact Us Box

Usage: Homepage, Emails

### Talk to a Retirement Specialist

 **1-800-601-5957**

M-F, 9am to 9pm ET

 [Send email](#)



**GOOD**

#### Have questions?

We're here to help.

(800) 601-5957

[Send email](#)

(General help)

**BETTER**

#### Get real-time help

(More specific type of help)

Talk to a Retirement Specialist

(800) 601-5957

Mon – Fri, 9am to 9pm ET

(Notice we included the days and hours)

[Send email](#)

**BETTER**

#### Get real-time help. No strings attached.

(Written differently, but still a more specific type of help)

Talk to a Retirement Specialist

(800) 601-5957

Mon – Fri, 9am to 9pm ET

(Added days and hours to set a clear expectation)

[Send email](#)